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# GOLF CONSUMER PROFILE

FIFTY YEARS 1936 - 1986

NGF™

NATIONAL GOLF FOUNDATION

# GOLF CONSUMER PROFILE

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# Introduction

Golfers. There are as many perceptions of what a golfer is as there are golfers themselves. These perceptions range from the Gatsby-like old monied country club member to the *Caddy Shack*-like weekend duffer.

Because of this diversity of perceptions, the National Golf Foundation felt the need to investigate who these golfers really are. With the help of Market Facts, a selected sample of golfers were surveyed. Not only did the survey attempt to identify golfer attitudes and allow classification into attitude groups, but it also investigated a myriad of golfer consumer habits.

With golf a $6 billion dollar a year industry, the need to understand these consumer habits is obvious. Therefore, identifying present consumer habits was one concern of the *Golf Consumer Profile*. Just as important, however, was identifying future marketing opportunities for the golf industry.

The survey investigated golfer consumer attitudes on such things as equipment purchases, golf travel, golf instruction, frequency of play, media habits and other attitudes relevant to the industry. This information generated by the survey reflects golfers' own attitudes. Because of this, we believe this report can be used in helping identify marketing opportunities for the golf industry.

The *Golf Consumer Profile* will be repeated every two years in order to monitor trends and changes in golfer attitudes and consumer habits.

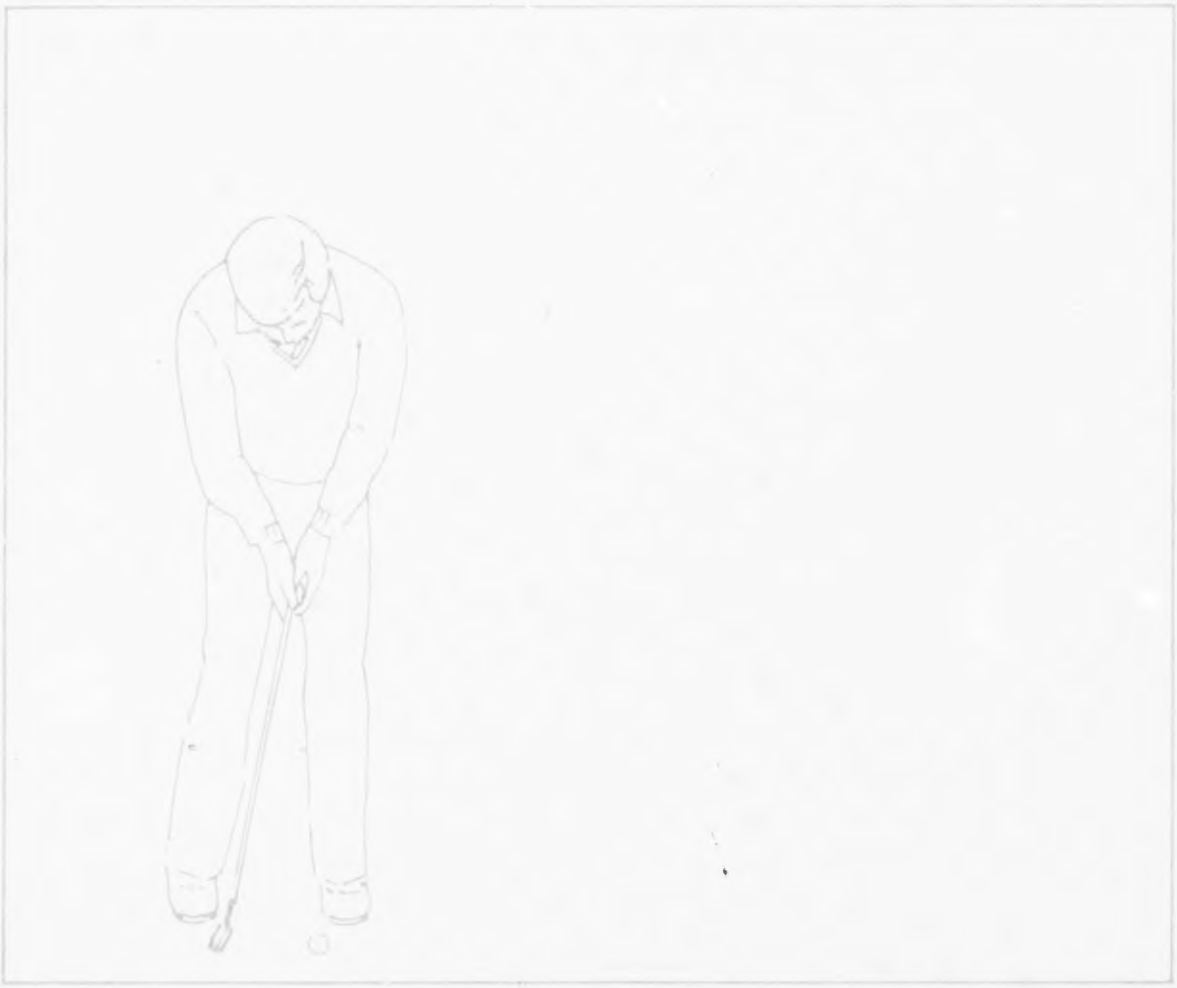
## Methodology

The *Golf Consumer Profile* survey was conducted by mail using the Golf Consumer Mail Panel maintained by Market Facts, Inc. This panel was established through a 20,000 household sampling of the Market Facts Consumer Mail Panel in October of 1985.

An eight page questionnaire was sent to a nationally representative sample of 1,973 golfers. Questionnaires were mailed on April 25, 1986. By the June 4th closing date, 1,212 usable questionnaires were returned. This high response rate of 61 percent is typical when using established survey panels.

As an additional step to ensure the national representativeness of the results, the return sample was weighted to match the U.S. Census Statistics on key demographic variables of age, sex, household income, census region, population density and frequency of play. As a result of this weighting, non-response bias has been eliminated and the data accurately represents golfers nationally.

# TYPES OF GOLFERS



Chapter 1

# Types of Golfers

One of the basic objectives of the golf survey was to study the attitudes that golfers have about the game of golf. The survey asked golfers to indicate the extent to which they agreed or disagreed with 32 statements about golf. Five examples of the questions are listed below.

- Playing golf provides a good opportunity to discuss business.
- Playing golf is mentally challenging.
- I find that I'm often competing against myself when I golf.
- Playing golf improves my health.
- I often play golf because there's nothing else to do.

Their answers led to the categorization of golfers according to their attitudes and opinions about the game and their participation in it. A cluster analysis of these answers revealed five distinct attitude segments among golfers. This chapter continues with a description of each of the five groups.

## COMPETITORS

As the label would suggest, golfers in this segment play primarily because they love to compete. Competitive golfers are far more likely to play golf for a bet than golfers in other segments. It appears that a mental challenge and a low score are the major benefits derived from golf for this group. Figure 1.1 compares the response of competitive golfers with the rest of the golfing population on a selection of attitude questions.

Competitors are better golfers than golfers from other segments; they claim an average score of 19 strokes over par for an 18-hole round. Low scores are extremely important to them and they strongly disagree with the statement, "As long as I hit the ball well, score doesn't matter." Competitors are upset with themselves when they don't play well.

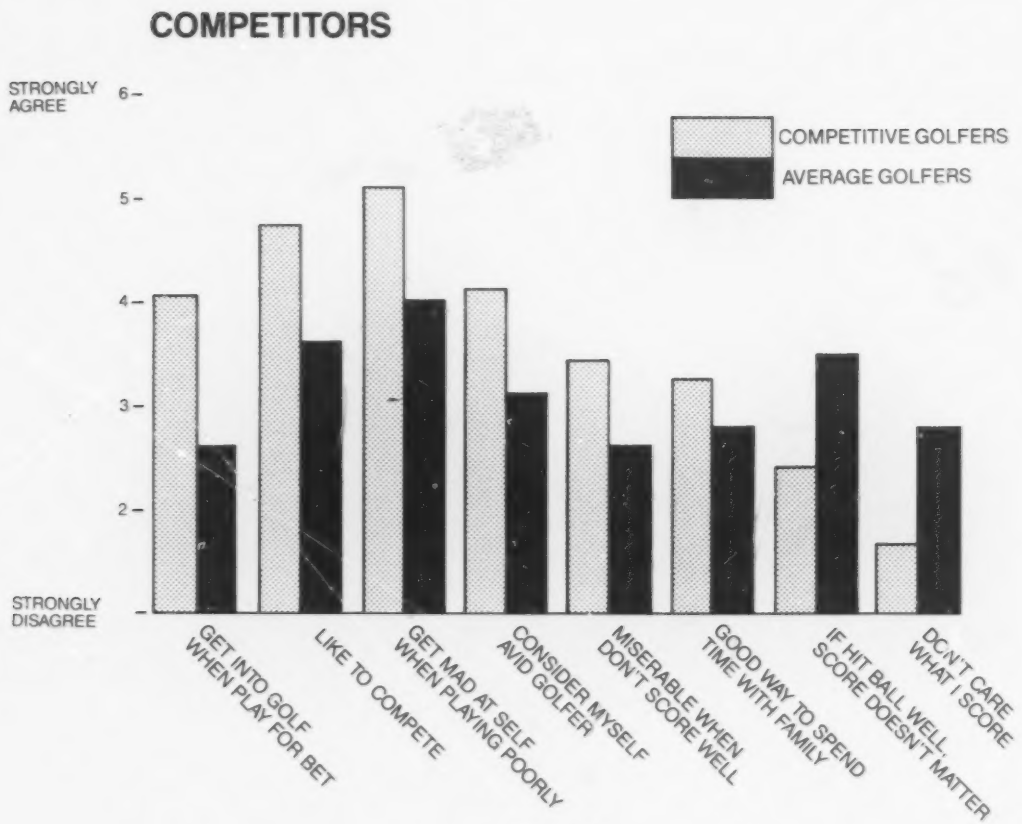



Figure 1.1

Competitors play more often than golfers from most other segments. They reported playing an average of 31 rounds in the past year. They represent 18 percent of golfers in the sample and about one-fourth of all rounds played.

## HEALTHY/SOCIABLES

Healthy/Sociables are very similar to Competitors in terms of their attitudes toward golf, but some differences do exist. Like Competitors, Healthy/Sociables are far more likely to play golf for competitive reasons than golfers in other segments. They agree, but to a lesser extent, with statements such as, "I like to compete" and "I play for a bet." Figure 1.2 shows the response of Healthy/ Sociables to certain attitude questions.

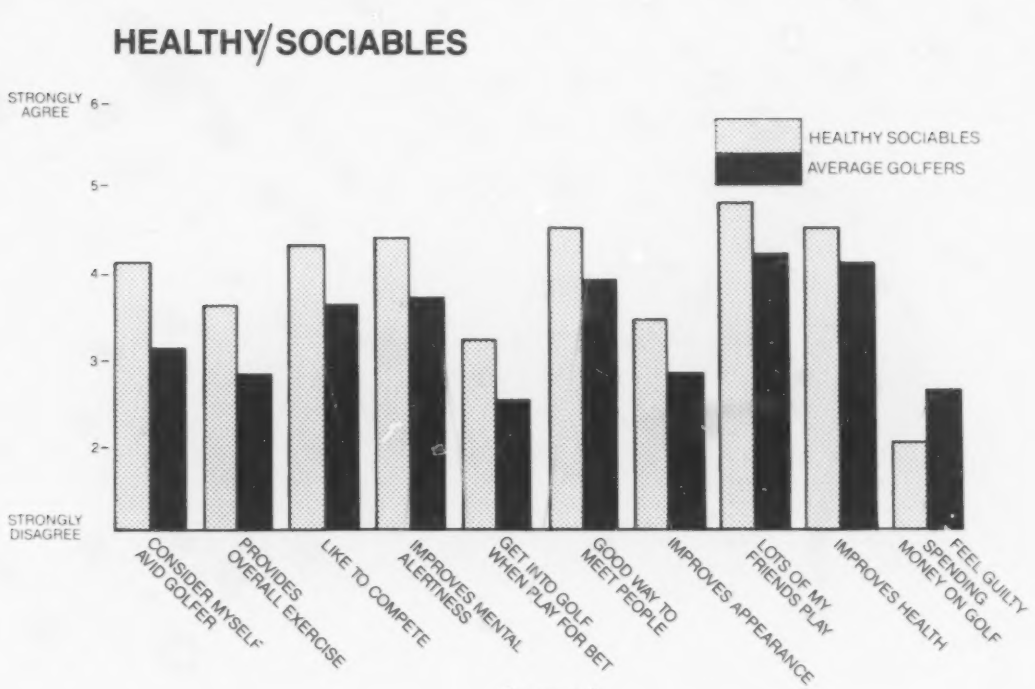



Figure 1.2

In contrast to Competitors and other golfers, however, Healthy/Sociables are more likely to recognize the self-improvement and health-related benefits of golf. They feel that golf improves their health, physical appearance and mental alertness. A large proportion of this group claims that golf provides most of their physical exercise. This group is also characterized by its social attitude toward golf. Golfers within this group tend to have many friends who play golf and they consider golf a means of meeting people.

Healthy/Sociables represent the most active golfer segment. They report having played golf an average of 44 rounds in the past year (over twice as many times as other golfers). Not surprisingly, they categorize themselves as "avid golfers." In addition, Healthy/Sociables account for a disproportionately large share of all golf rounds played. The segment includes only about 18 percent of all golfers, yet represents nearly 37 percent of all rounds played.

## OUTDOOR RELAXERS

Outdoor Relaxers are considerably different from Competitors and Healthy/Sociables. This segment is characterized by its non-competitive disposition. Outdoor Relaxers don't care what they score; hitting the ball well is all that matters. Golf serves as an outlet for releasing tension. Outdoor Relaxers don't become frustrated when they play and don't get mad at themselves when they play poorly. Figure 1.3 highlights outdoor relaxers' response to key attitude questions.

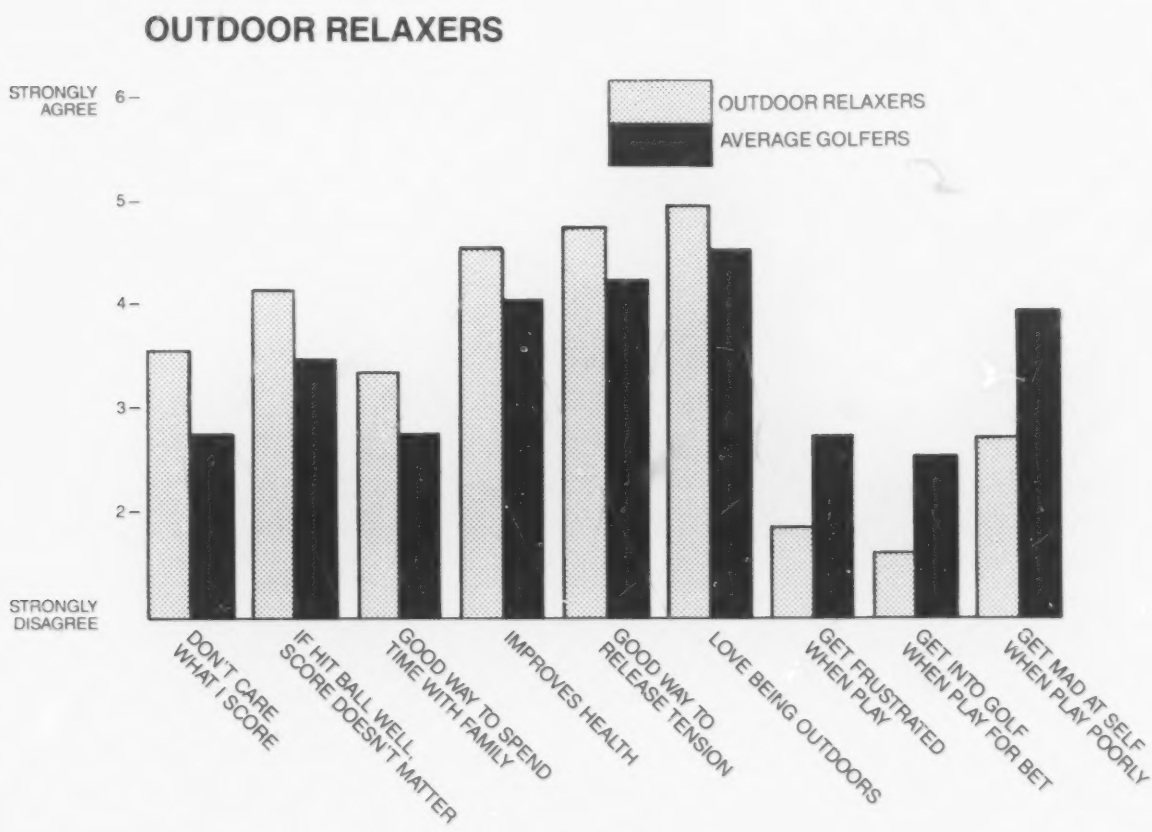



Figure 1.3

This group is motivated to play golf by the love of being outdoors. Compared to other golfers, Outdoor Relaxers express greater appreciation of the scenery provided by golf courses. Improved health also appears to be an important benefit for this segment.

The Outdoor Relaxer segment is the smallest of the five attitude segments. They claim an average of approximately 17 rounds played in the past year and tend to be mediocre golfers. They average about 25 over par for an 18-hole round.

**NON-COMPETITORS**

Like Outdoor Relaxers, Non-Competitors can be categorized by their passive nature. They also don't care what they score. They are mainly concerned with hitting the ball well and don't like to compete. However, unlike Outdoor Relaxers, golfers in this segment appear to find little satisfaction and benefit in playing golf. Figure 1.4 presents the responses of Non-Competitors to certain attitude questions.

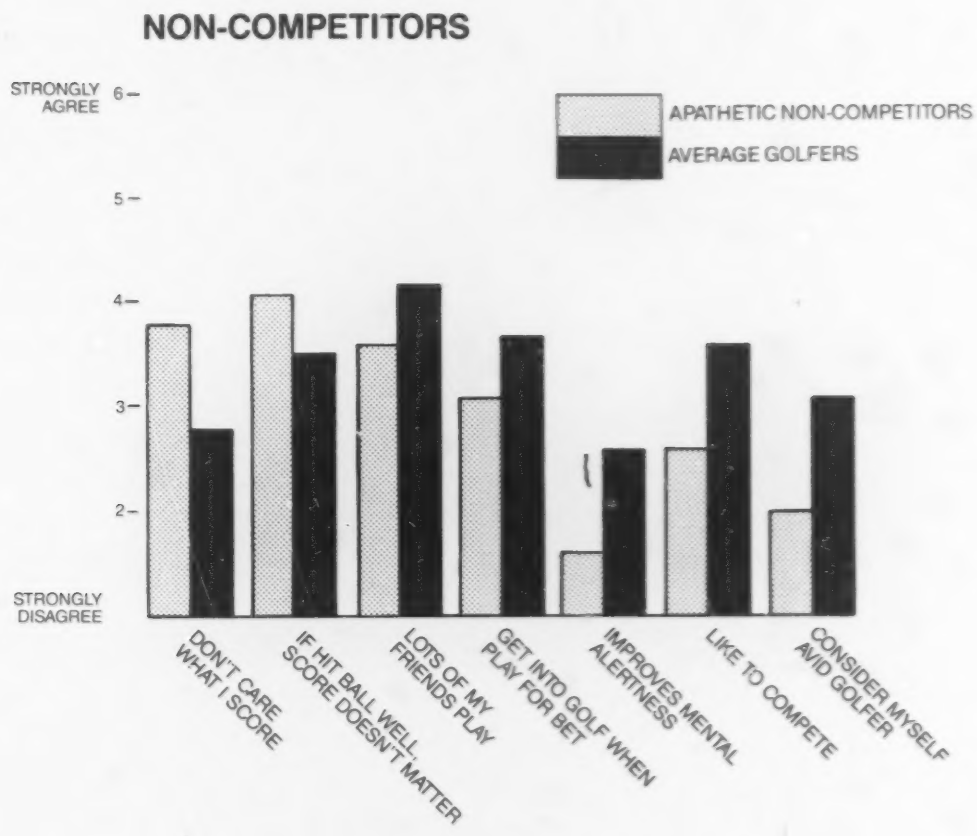



Figure 1.4

A relatively large share, about 22 percent of all golfers, can be classified as Non-Competitors. Members of this segment play golf far less frequently than other golfers, only 8.5 rounds per year on average. Consequently, this segment accounts for a disproportionately low share of all golf rounds played (9%). In terms of playing ability, this segment is composed of the worst golfers. Non-Competitors average 31 strokes over par for an 18-hole round.

Members of this segment may be on the verge of leaving the game and represent a prime target for campaigns to increase the number of golfers and rounds played.

**FRUSTRATED GOLFERS**

The Frustrated Golfer segment includes one-fourth of all golfers and is the largest of the five attitudinal segments identified. They outscore only the Non-Competitors. The claimed average 18-hole score for this group is nearly 27 over par. Members of this segment play relatively infrequently (13.6 rounds per year on average) and account for about 16 percent of all rounds played. Figure 1.5 shows the response of frustrated golfers to a selection of attitude questions.

This group is characterized by its strong feelings of frustration and guilt. They're frustrated when they play, they're mad when they play poorly, and they're miserable when they don't score well. Furthermore, they're guilty about taking the time and spending the money required to play golf. Frustrated Golfers' feelings of guilt apparently stem from their expectations of playing better than they're capable of playing.

The points which follow compare each of the five golfer attitude segments with the golf population in general.

## FRUSTRATED GOLFERS

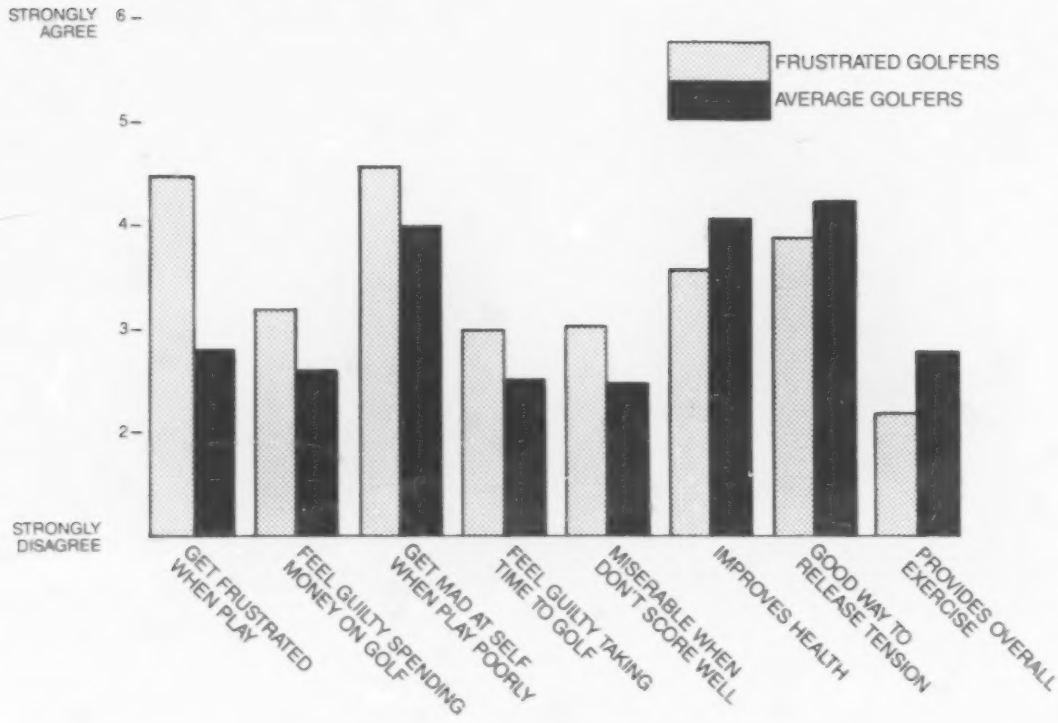



Figure 1.5

### BEHAVIORAL AND DEMOGRAPHIC SUMMARY

**Competitors**

More likely to be male (91% vs. 79%)
Younger - under 50 (81% vs. 70%)
Better educated, some college (67% vs. 61%)
Disproportionately large spenders on golf equipment/accessories (25% of all dollar volume)

**Healthy/Sociables**

Older - 50 and over (45% vs. 30%)
Less educated, some college (54% vs. 61%)
More likely retired (23% vs. 11%)
Higher average annual household income ($37,000 vs. $35,200)
Disproportionately large spenders on golf equipment/accessories (32% of all dollar volume)

**Outdoor Relaxers**

Less likely to be male (67% vs. 79%)
Older - 50 and over (37% vs. 19%)
Lower average annual household income ($32,700 vs. $35,200)
Proportionate spenders on golf equipment/accessories (14% of all dollar volume)

**Non-Competitors**

Less likely to be male (66% vs. 79%)
Slightly younger - under 50 (79% vs. 73%)
Disproportionately small spenders on golf equipment/accessories (10% of all dollar volume)

**Frustrated Golfers**

More likely to be male (87% vs. 79%)
Younger - under 30 (45% vs. 36%)
Better educated, some college (70% vs.61%)
Slightly lower average annual household income ($34,200 vs. $35,200)
Disproportionately small spenders on golf equipment/accessories (19% of all dollar volume)

## SUMMARY

This chapter has shown that five distinct attitude segments exist in the golfing population. It is important to recognize the existence of these segments and be able to describe the golfers in each attitude group if the behavior of the golf consumer is to be understood and predicted. This type of analysis is essentially trying to get inside the consumer's head, to understand what the consumer wants in terms of golf related goods and services. Knowing consumer needs, products can be developed that will appeal to specific groups and may be accurately targeted to that group.

# REASONS FOR PLAYING

Chapter 2

# Reasons for Playing

When the National Golf Foundation promotes family golf as a laudable trend for the future, it isn't simply coining a term to correspond with mother, apple pie, and the American flag. The notion of family golf, to be sure, will induce a warm feeling for sentimentalists who play the game, but even cold facts bear out the importance of family to the growth and health of golf.

## HOW PEOPLE ARE INTRODUCED TO GOLF

If not for family, some 42 percent of today's golfers may never have been introduced to the game of a lifetime. Of all golfers identified by NGF/Market Facts research, nearly 18 percent were brought into golf by their fathers. A spouse, more often than not the male, accounted for another nine percent, while mothers, brothers and sisters combined to deliver eight percent of today's golfers to the first tee. The remaining portion of family-inspired golfers were wooed and won by "other relatives," according to statistics.

Even so, while family members frequently share their passion for golf with loved ones, people who play are more apt to have been originally attracted by a friend than by any single family member. That is true, at least, for male friends, identified in surveys by some 36 percent of the players as the source of their first exposure to golf. Include female friends and the friendship factor increases to nearly 40 percent.

Introduction by family and friends, plus the 10 percent who proclaim themselves to be self-introduced, leaves very few of today's golfers having emanated from more traditionally credited recruitment areas of golf professionals and instructional classes of all kinds. Figure 2.1 graphically presents golfers' method of introduction to the game.

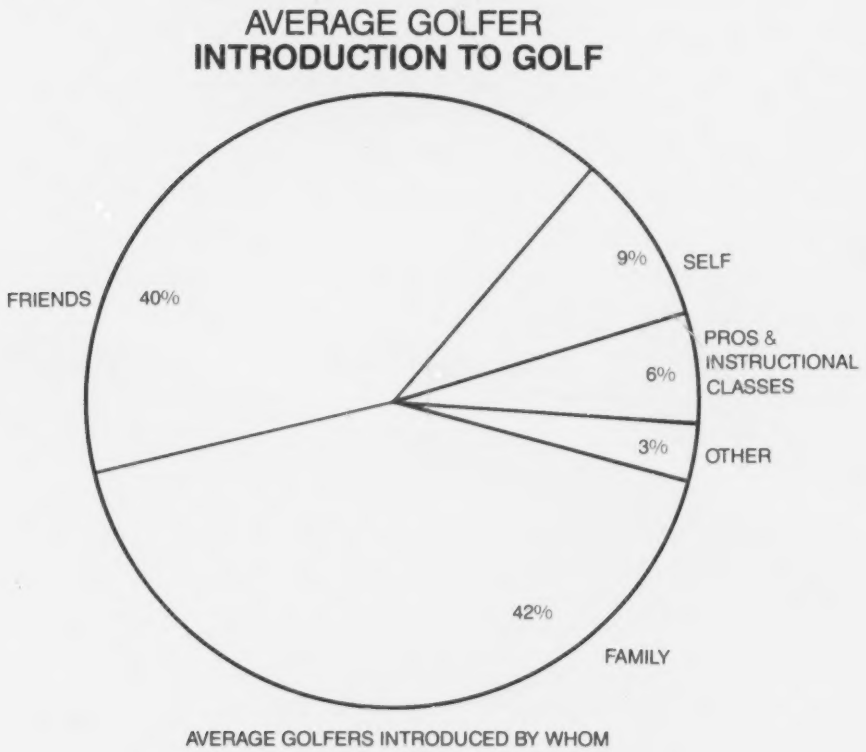



Figure 2.1

There are, however, some interesting variations in the figures. For example, a woman's entrance into golf is heavily dependent upon her husband's interest and, perhaps, his patience. Statistics show 37 percent of the women golfers were introduced by their spouses. However, not many husbands (2.8%) followed their wives into golf. There are variations, too, among different categories of golfers as shown by Figure 2.2.

Competitive golfers show a large propensity (21%) to have been father-introduced, as do those who identify themselves as Frustrated golfers (20%). So if Dad gets the credit for fostering a competitive spirit, he may also be debited with golf-related psychoses.

## INTRODUCTION TO GAME OF GOLF

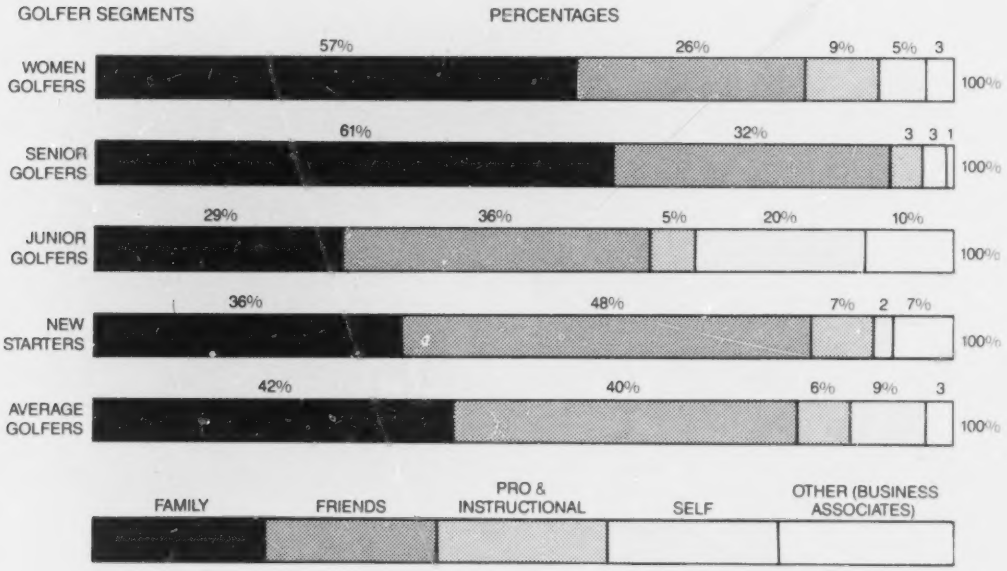



Figure 2.2

Impressively large percentages of those who play frequently, more than 25 rounds a year (13%), and those who play avidly for exercise (13%), found golf on their own. Sixteen percent of those who play solely for relaxation and being outdoors, and 32 percent of senior golfers, both consider themselves self-starters.

### WHY PEOPLE TAKE UP GOLF

Today's golfers can recite a string of reasons for having started the game. Of all golfers, 65 percent say they play for recreational enjoyment. Surprisingly, even 62 percent of those who struggle home 35 or more strokes over par and 60 percent of the frustration fraternity agree on golf's recreational attributes. Fully 65 percent of the women golfers concur with this clearly number one reason for playing.

Second among reasons most frequently mentioned by all golfers for playing the game is the fact that friends play. This encourages 54 percent to follow this pastime. The urge to get outdoors is cited by 44 percent, followed by the

challenge (37%) and relaxation (37%). It seems some players may even find the challenge relaxing.

Exercise as a motive to play ranked only sixth as an inducement, with 36 percent electing golf to trim and tone the body. Females (49%) and seniors (57%) are inclined to play golf for exercise, many of them likely depending upon golf for most of their physical activity. Heavy golfers, (25 or more annual rounds), also cite exercise value in nearly half of their responses. The 55 percent of Healthy/Sociables thought the game valuable as exercise.

Golf's image is relatively important to only 19 percent of all golfers, but the factor grows in importance among juniors (26%), seniors (27%), heavy golfers (26%), and the physical fitness crowd (28%). Non-Competitors and newcomers are less impressed, each group producing fewer than 12 percent who feel image of the game is reason for playing.

Most people couldn't care less whether business associates play, the total universe showing only 10 percent so motivated. Even fewer (9.2%) play to meet people. These are areas of potential appeal which might be promoted more vigorously by agencies devoted to the proliferation of golfers.

**EARLY INSTRUCTION**

Approximately one-third of all golfers surveyed managed to get into the game without any specific early instruction. This has been particularly true of male golfers, fewer than 60 percent of whom sought and found lessons from any source. Eighty-four percent of women golfers reported they had received early instruction.

A trend is apparently developing, however, which will deliver better-trained players to the links. While only 58 percent of the seniors (60 years and older) remember any instructional help when they started, more than 80 percent of the junior respondents took early lessons.

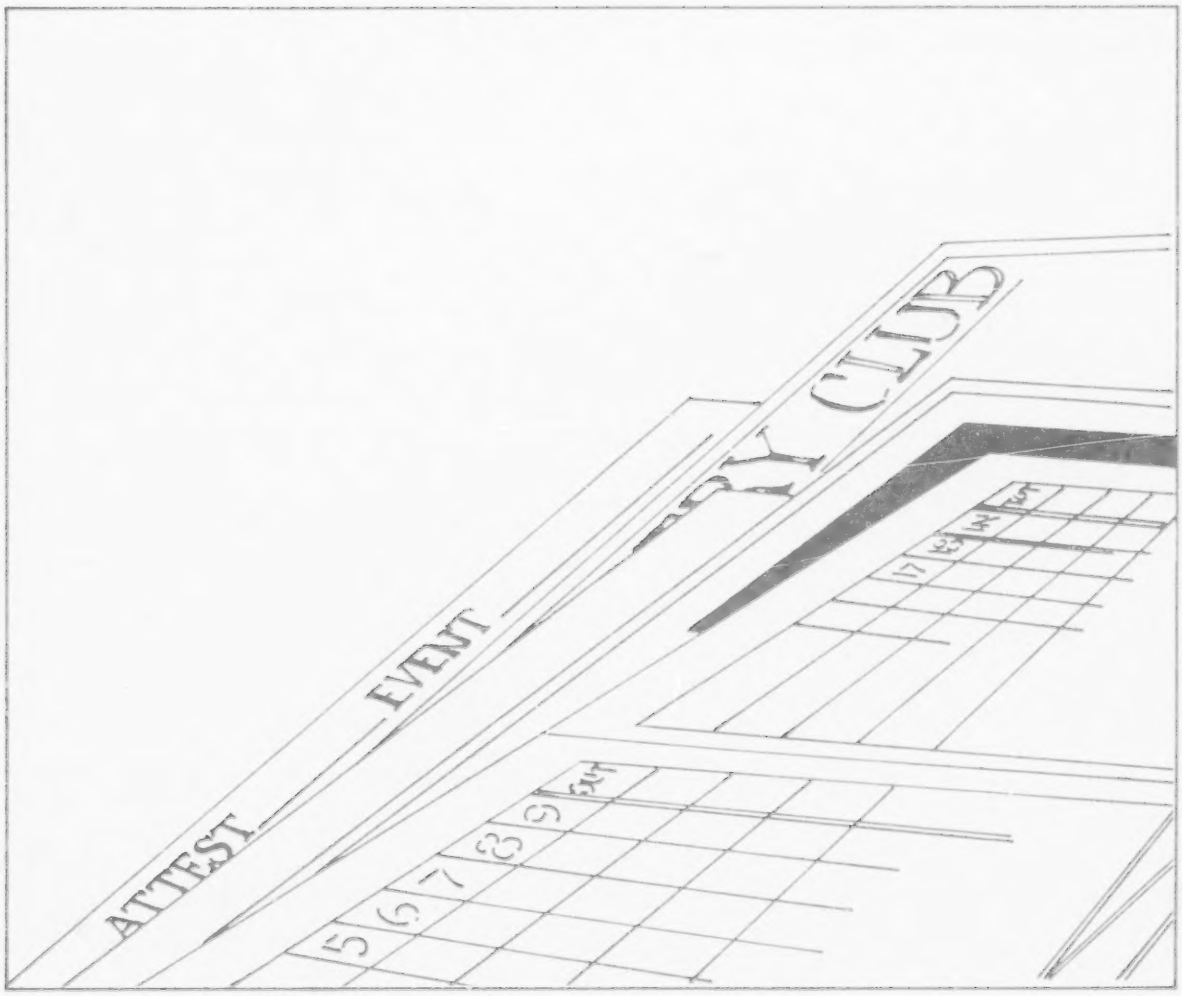
Curiously enough, those luckless golfers scoring 35-plus over par comprise one of the largest (76.4%) segments of lessons tee graduates. Only 60 percent of the scratch-to-14 over par players admit to beginning golf as a student.

Who does the most teaching? According to the survey, it is friends and family, accounting for 35 percent and 39 percent of the instruction respectively. The golf professional gets 22 percent of the early instruction of all players. But he may need to tighten his control of the flock. Of all seniors who remember early lessons, over 46 percent credit them to professionals, while a small 13 percent of current juniors are getting professionally-taught starts. Relatives, very likely the father, fill the instructional role most often for juniors (57%) and females (42.6%).

In the early 1980s, when he was the commissioner of the Ladies Professional Golfers Association, Ray Volpe suggested that golfers themselves might very effectively stimulate the growth of the game in golfer population. Addressing the first National Golf Foundation Forum of Golf in Dallas, Volpe said, "If everyone playing golf today simply brought one member of his or her family into the game, the golfer population would double overnight."

NGF/Market Facts statistics attest Volpe's insight. Family is one of the greatest influences in introducing new people to golf and in teaching them the rudiments of the game.

# FREQUENCY OF PLAY



Chapter 3

# Frequency of Play

The golf industry generally feels that the growth of golf is dependent on, among other things, bringing new players into the game. However, increasing the participation level of current golfers can have just as dramatic an effect on golf's growth. Statistics show that half of all golfers, over eight million of them, play golf less than eight times a year. In fact, a fourth of all golfers who claim to be participants only play golf once or twice a year.

## DIFFERENCES IN FREQUENCY OF PLAY

Figure 3.1 reveals the fact that 25 percent of all golfers play 77 percent of all rounds. These golfers are considered the heavy frequency participants (25+ rounds a year). The medium frequency golfer (8-24 rounds per year) comprises

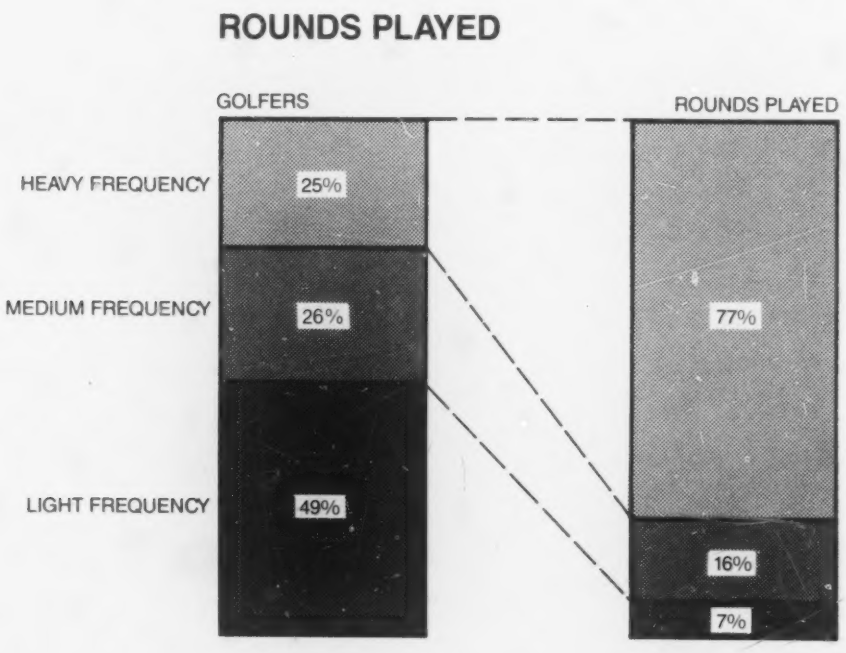



Figure 3.1

another 25 percent of all golfers and 16 percent of all rounds. It is up to the golf industry to turn the infrequent golfer into a medium or high frequency golfer. To do this, it must first be understood who are the frequent golfers and who are the infrequent golfers. Figure 3.2 presents the play frequency breakdown for different segments of golfers.

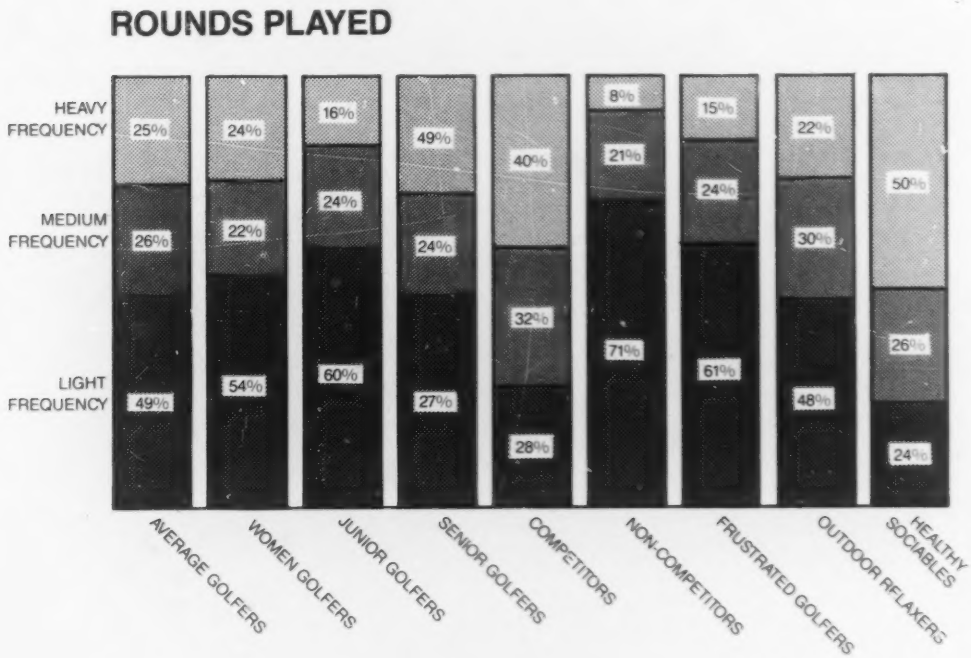



Figure 3.2

Frequent golfers are older than infrequent golfers. The average age of the frequent golfer is 47 years, the average infrequent golfer is 35 years old. In fact, about one-third of all frequent golfers are seniors. While the typical golfer averages just 22 rounds of golf each year, the senior golfer averages 46 rounds of golf per year. Junior golfers, on the other hand, average only 14 rounds of golf per year.

Chapter One revealed that the Healthy/Sociable golfers, typified by the retiree, are very often frequent golfers. Statistics show that one-half of all Healthy/Sociables play golf 25+ times per year. The Competitive golfer is also more apt to be a frequent golfer, as 40 percent of the competitors are classified

as frequent golfers. However, statistics show that only seven percent of the Non-Competitive golfers and only 15 percent of the Frustrated golfers rate as high frequency participants. Shown below are some typical golfer segments and frequency of play distributions within each group.

Although there is a marked difference in frequency of play among golfer segments, there is a common thread among them. Research indicates all golfer segments want to play more golf. Ninety percent of all golfers want to play more golf than they currently do. Ninety percent of all junior golfers, who are typically infrequent golfers, show a desire to play more golf. Eighty percent of the heavy frequency golfers want to play even more golf than they currently do. In fact, all golfer segments identified by NGF/Market Facts research reported at least a 75 percent preference to play more golf than they currently do.

## BARRIERS TO MORE FREQUENT PARTICIPATION

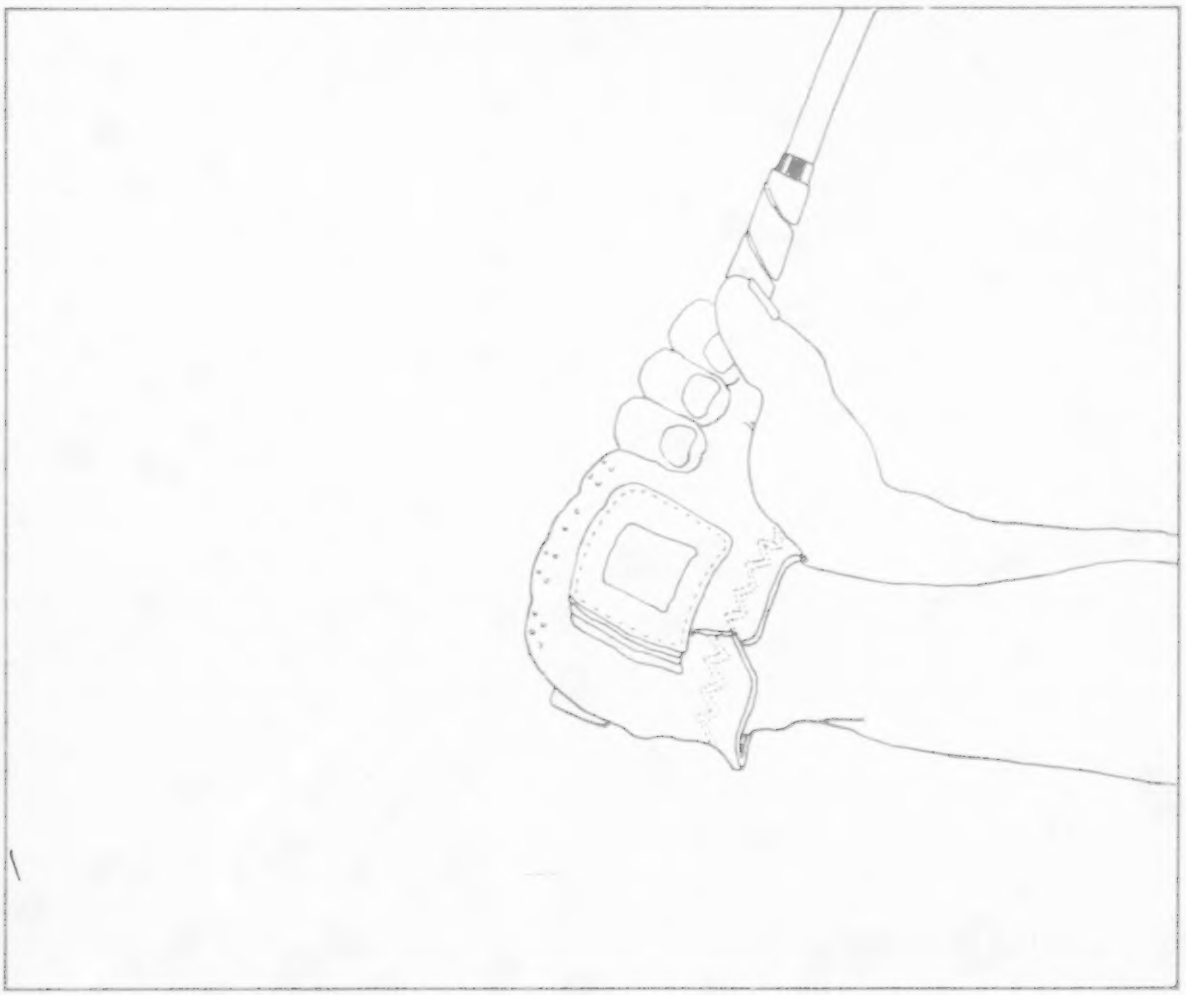
The question is, then, why don't these people play more golf? There are many reasons golfers play less often than they prefer. Over 70 percent of all golfers responded that there is not enough time to play due to work responsibilities. Time constraints obviously weigh heavily on golfers, as the second ranked reason for not playing, noted by 40 percent of all golfers, is that there is not enough time to play due to family responsibilities.

Another 30 percent of all golfers felt that golf green fees are too expensive. Other significant reasons noted by golfers are courses are too crowded/too hard to get tee times (22%), restricted by weather conditions (21%), don't have enough people to play with (16%), and don't play well enough (13%).

## IMPACT ON THE GROWTH OF GOLF

NGF statistics show that every round of golf played adds, on an average, $15.42 to the overall golf economy. This figure includes all golf related expenditures, e.g., green fees, golf car fees, equipment apparel, etc. If every infrequent golfer were to play just four more rounds per year, it would result in an additional $.5 billion injected into the golf economy.

# PLAYING CHARACTERISTICS



Chapter 4

# Playing Characteristics

One of the most intriguing aspects of the NGF/Market Facts Golf Consumer Profile survey has been the search for the "average" golfer. What average golfers tell one another about their prowess is one thing; what they report in the privacy of a confidential survey might very well be something entirely different.

## SCORING ABILITY

Two-thirds of all golfers report that they normally break 100 on a regulation (par 72) 18-hole golf course. Only one-third are regularly under 90 strokes and the elite group that posts scores in the 70s represent only eight percent of all golfers.

The typical golfer comes home about 25 strokes over par, or, on the regulation course, at 97. Men alone do a little better than that, averaging 23 over par, compared to women's 35 over par. The breakdown for some typical golfers in various categories and their average strokes over par is shown in Figure 4.1.

Senior golfers, perhaps a little shorter off the tee but often notoriously accurate, prove their prowess in statistics. Those 60 years and older check in with average scores 24 strokes over par, about one stroke better than the average for golfers in general.

## DISTANCE

Scoring, of course, is the bottom line, but distance just as often is the conversation piece in the locker room. Accuracy is the element of an expert's game that is envied by everyone who has ever carved a shot across a right side boundary or trembled at the sight of a well-tucked pin. The profile survey probed, therefore, for both distance and aim. Some interesting results were found.

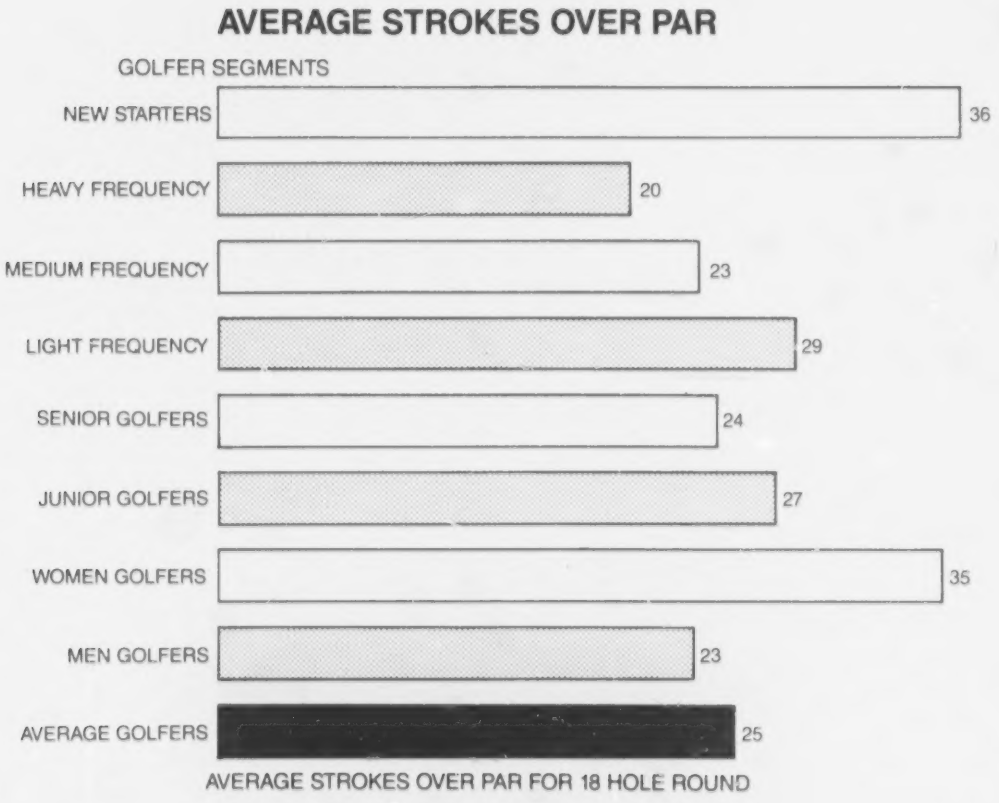



Figure 4.1

The study showed that 200 yards in driving average is a barrier roughly equivalent to 97 strokes on a scorecard. The average male golfer realizes about 199 yards off the tee and the average female moves the ball approximately 131 yards with her driver. When they select five-irons for approach shots, men can count on an average of 137 yards and women only 91 yards. Distances for these clubs among various categories of golfers are presented in Figure 4.2.

## TRAJECTORY

Five separate ball flight patterns were used in asking golfers to describe accuracy: straight ball, draw, hook, fade, and slice. As expected, almost 50 percent acknowledged that the fade or slice most accurately described their general flight pattern. However, as the golfer's skill increased, there was more likelihood he or she would essay straight shots or even effect a desirable draw.

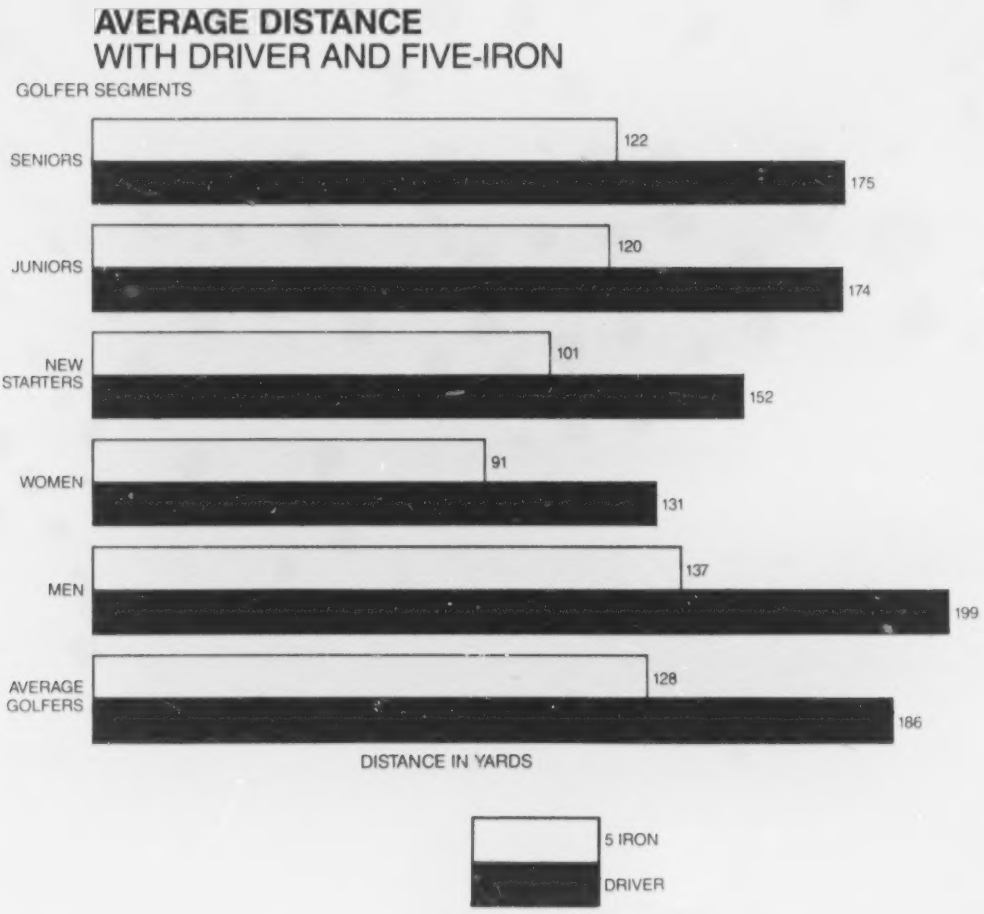



Figure 4.2

Low handicappers draw or hit the ball straight 51 percent of the time. Fifty-seven percent of the juniors, swinging undoubtedly from Port Authur, as the saying goes, tend or fade or slice the ball. Only 40 percent of the seniors confess to authoring the accursed "banana ball" more often than not.

**WARM-UP AND PRACTICE**

Even though stretching exercises and other warm-up routines are universally recommended by golf instructors, fewer than 60 percent of all golfers report any kind of loosening measures before playing a round of golf. Only 48 percent of all women golfers warm up prior to playing and just 50 percent of all seniors go

through the routine, even though they might appear the most likely to experience muscle strain.

Significantly, the more a golfer plays, the more apt he is to wiggle before he waggles. Seventy-two percent of heavy golfers report exercise routines before play, as do 63 percent of medium frequency players, but only 51 percent of the occasionals. Three-fourths of the competitive golfers warm up, but only 46 percent of the non-competitive, recreational players.

The survey asked for specific warm-up routines: hitting range balls, chipping, putting, practice swings. The most common techniques are stretching (20%) and putting (60%). In what could be the beginning of a trend emphasizing scoring, it was found that junior golfers placed special emphasis on their short games. Seventy-seven percent putt and 42 percent chip before a round. These figures compare respectively to 66 percent and 31 percent for all golfers. Warm-up techniques vary with frequency of play.

These warm-up techniques focus on pre-play practices. What about practicing without playing? Sad but true is the fact that 38 percent of all past year golfers never practice. Another 20 percent practice only a couple of times a year.

It was no surprise that the higher handicap golfer is much less apt to practice than the average or highly skilled player. Among those with 0-14 handicaps, 55 percent practice at least once a month. Percentages drop to 47 percent for average and only 31 percent for high handicap golfers. In the latter category, 47 percent said they never practice.

# INSTRUCTION

Chapter 5

# Instruction

Playing well seems to be a priority for most people who play golf. Statistics show that three out of four golfers feel it is important to score well. Almost the same number of golfers, approximately 70 percent, actually get mad at themselves when they play poorly. It seems, at least for golfers' mental health, that they would do anything and everything to become consistent players.

As with most sports, in golf there seems to be two main avenues to becoming a better player: practicing and receiving quality instruction. However, from the previous inspections of golfers' ability, statistics indicated that only 40 percent of all golfers practice even once a month. Even more alarming is the fact that over one-third of all golfers never practice. The percentage of golfers who receive professional instruction is even less encouraging. Research indicates that only 14 percent of all golfers have taken professional lessons in the last year. Although this percentage is very low, lesson taking is stronger in select golfer segments.

For example, young players are more apt to take lessons, as over 30 percent of junior golfers have taken at least one lesson during the past year. Also, the more frequently one plays golf, the more likely that person is to take a lesson. Twenty-seven percent of high frequency golfers, as opposed to only 10 percent of infrequent golfers, have taken at least one lesson the past year. Figure 5.1 presents the incidence of lesson taking among different groups of golfers.

Surprisingly, lesson taking does not seem to be related to ability. Of the four ability groups used in the survey--handicaps of 0-14, 15-22, 22-34, and 35+ and over--three of the groups showed approximately 17 percent had taken at least one lesson. The only exception was in the 23-34 handicap range, where only about 11 percent had taken at least one lesson in the past year.

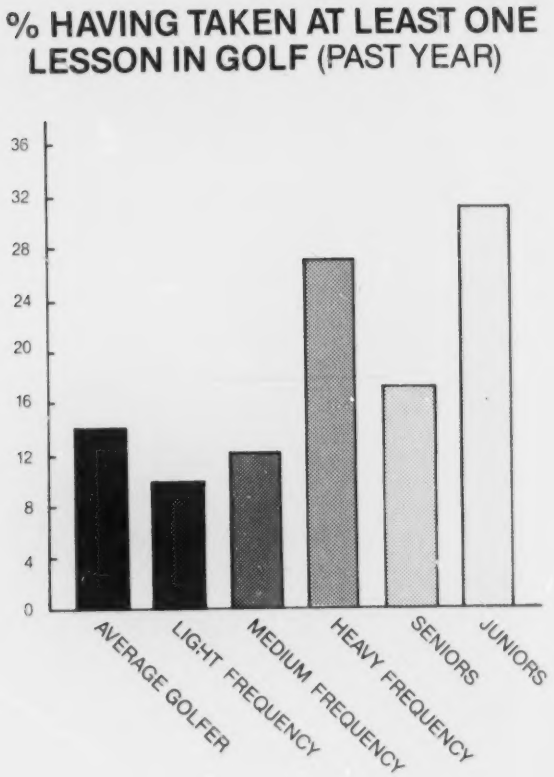



Figure 5.1

There was significant lesson taking differences by psychographic groups as shown in Figure 5.2. The Competitive golfer and the Healthy/Sociable golfer reported 22 percent of its members having taken a past year lesson. As would be expected, the Non-Competitive golfers reported that just one in 10 took to the lesson tee this past year.

How effective were these lessons? To the golf professionals' credit, lesson takers view lessons as extremely helpful. Two-thirds of all lesson takers responded that their lessons were very helpful. Approximately one-third of all golfers having taken lessons considered the lessons at least somewhat helpful. Only one percent responded that the lessons they took were no help at all. Praise, indeed, for the teachers of the game.

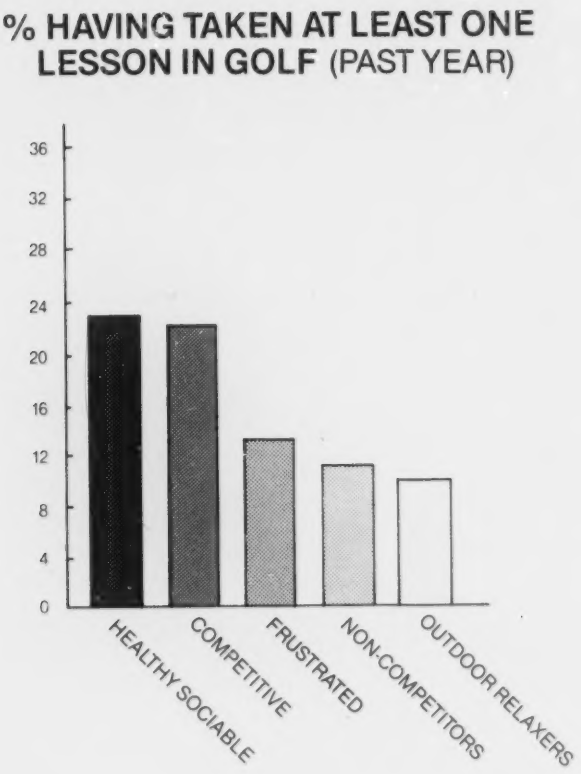
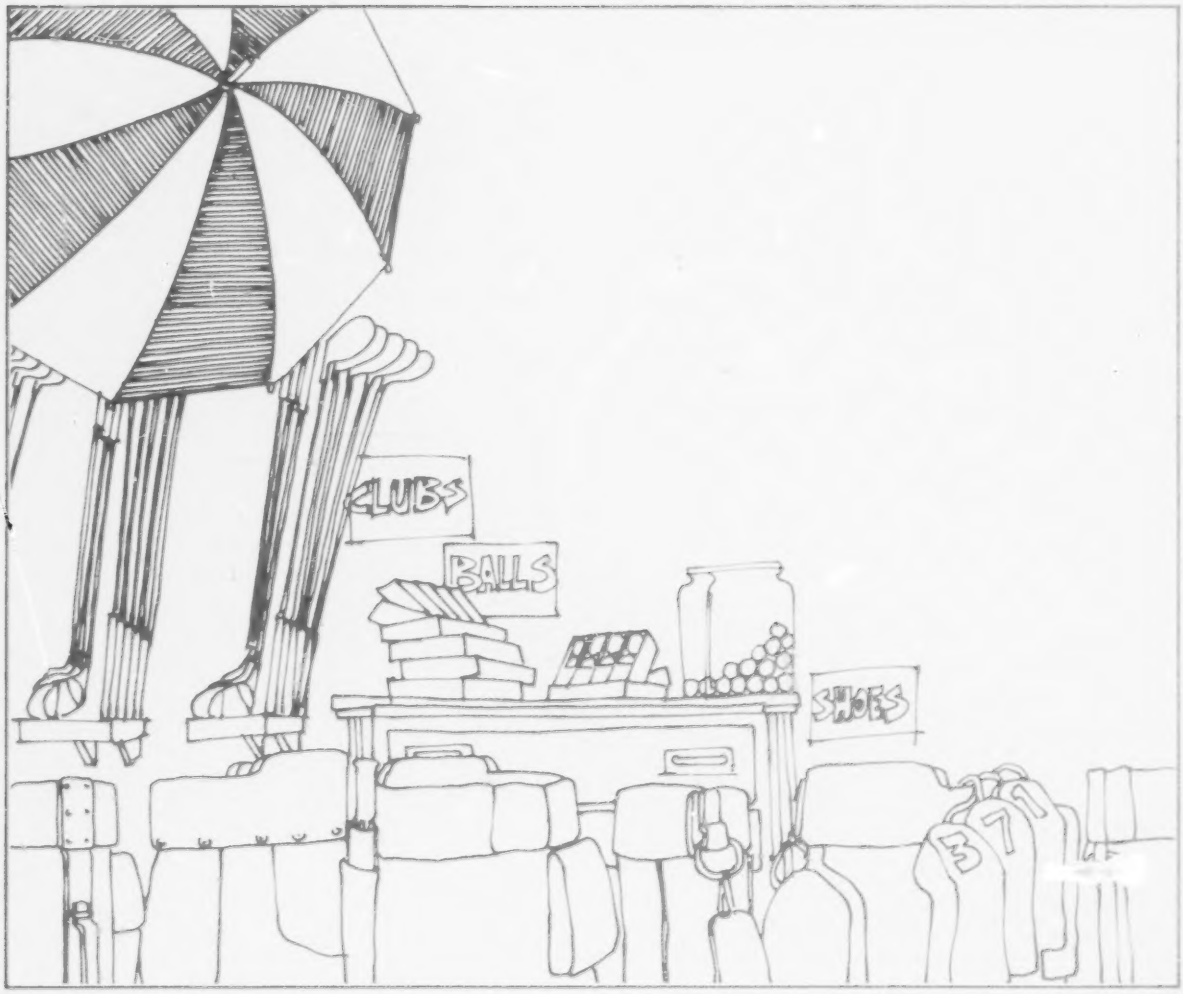



Figure 5.2

As with most ratings, there are a couple of slight exceptions in relation to the helpfulness of a lesson. In what could be a reflection of beginner's frustrations, only 55 percent of new starters reported finding lessons very helpful, 38 percent rated professional lessons as somewhat helpful and 7 percent described the lessons as not at all helpful.

The basic message of this chapter from the survey findings is that people who do take lessons find them very helpful and consider it money well spent. However, not very many golfers are taking lessons. This study would suggest that golf teachers could discover considerable latent demand if they intensified the marketing of their product.

# PURCHASING ATTITUDES AND BEHAVIOR



Chapter 6

# Purchasing Attitudes and Behavior

Golfers take great pride in their equipment. Conversations at the 19th hole at some point invariably turn to the new style of golf clubs on the market or the new golf ball with "x" number of dimples. It looks as if golfers are constantly searching for that miracle club, or the turbo-charged ball. However, this study suggests that golfers aren't "consuming" in great quantity the goods they so often speak about.

For example, only one in four golfers reported any money spent on golf clubs last year. Even fewer golfers, about 13 percent, purchased golf bags last year. What might seem even stranger, is the fact that almost 20 percent of all golfers reported no purchases of golf balls during the past year. A reasonable explanation for this could be the fact that one quarter of all golfers play golf less than three times per year.

At this point, it must be noted that the survey questionnaire required that golfers give their own impression of what they spend. There may be notable differences in what is actually spent and what the survey respondent perceived as being spent. Perception of spending could be more or less than actual spending. With this in mind, we can describe the consumer's estimates of expenditures on some assorted golf equipment categories.

Twenty five percent of golfers reported expenditures on golf clubs in the past year. This projects to an annual $450 million dollar club industry. Golf balls and golf clothing are also sizable industries as consumer annual expenditures are projected at $402 and $398 million dollars respectively. As previously noted, projections based on consumers' perceptions of their expenditures are likely to be conservative.

Figure 6.1 presents consumers' perceptions of factors affecting their purchases of clubs. Golfers feel most of these factors are at least somewhat important. The scaling system asked each respondent to rate each factor from 1 to 10, with one

being not at all important, and 10 being extremely important. The average golfer scored 8.8 for "feel/playability" and worked down to 3.9 for "tour pro's recommendation."

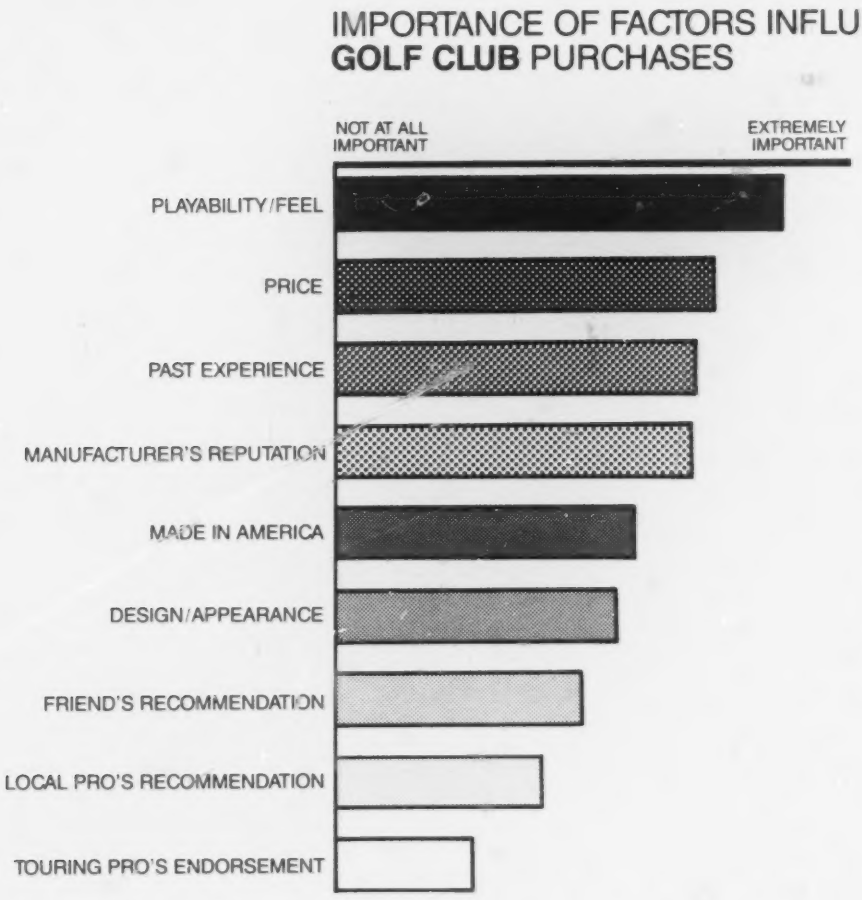



Figure 6.1

"Feel/playability" was consistently ranked the most important factor in club purchasing attitudes by all segments. There were some notable variations. Price was seen as second in line by most, except senior golfers and high frequency golfers, who ranked it considerably lower, fourth and fifth respectively. An even wider gap is discovered when considering the importance of the clubs being made in America. The two opposite age segments, juniors and seniors, feel very differently about the relative importance of clubs being American made. Juniors rank the made in America label as eighth, while seniors feel American made is

second in importance to "feel/playability." Absolute rating for American made for juniors was 5.3, still important, yet not as important as seniors who checked in with a 7.6 rating.

Golf consumers also rated nine factors involved in golf ball purchases. These ratings are shown in Figure 6.2. Ranked in order of importance as noted by the average golfer, they are durability, distance, consistant play/feel, accuracy, price, manufacturer's reputation, flight pattern, appearance, tour pro's recommendation. Once again, golfers feel most of these factors are important. The same scale was used here as in golf club factor ratings. Scores for golf ball factors ranged from 8.1 for durability to 4.0 for tour pro's recommendation.

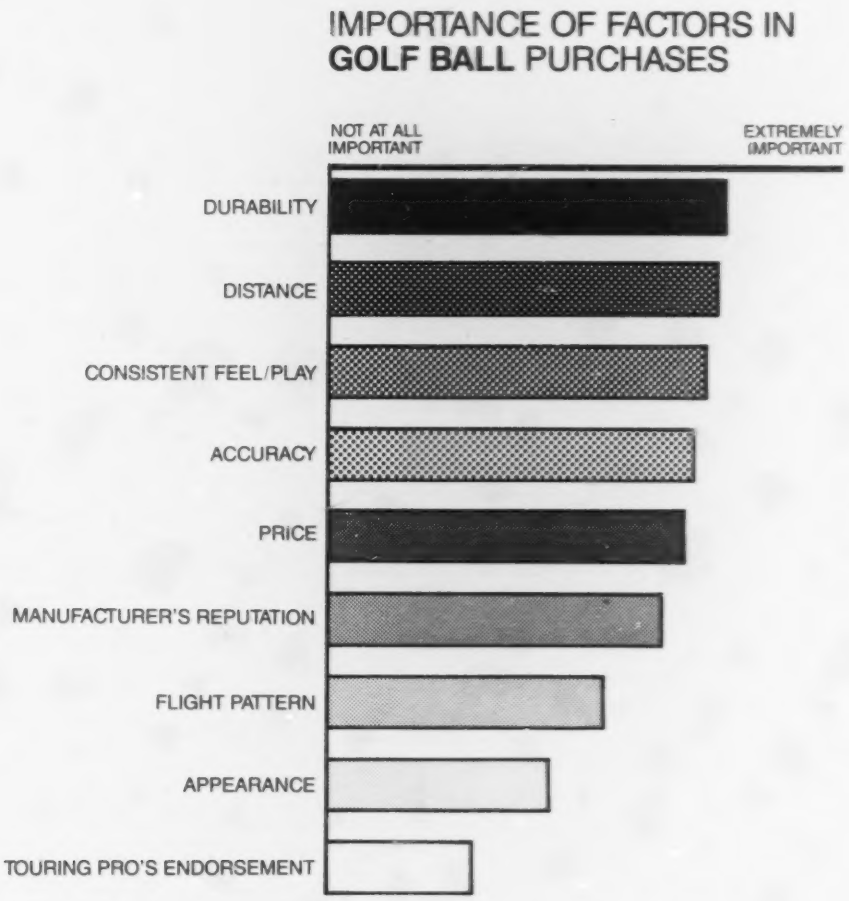



Figure 6.2

Not all golfer segments ranked durability as the most important factor involved in ball purchases. Senior golfers and beginning golfers ranked distance as the most important factor. The frequent golfer and the junior golfer responded that consistent play/feel, ranked third by the average golfer, was the most important golf ball buying characteristic to them. On the same note, consistent play/feel was knocked down to the sixth ranking for beginning golfers.

In an attempt to understand the thought process involved when a golfer purchases equipment, consumers were asked to respond with a level of agreement to eight statements relating to equipment purchases. The responses are summarized in Figure 6.3. Consumers are very price sensitive. They perceive all golf balls to perform about the same and claim brand loyalty in balls.

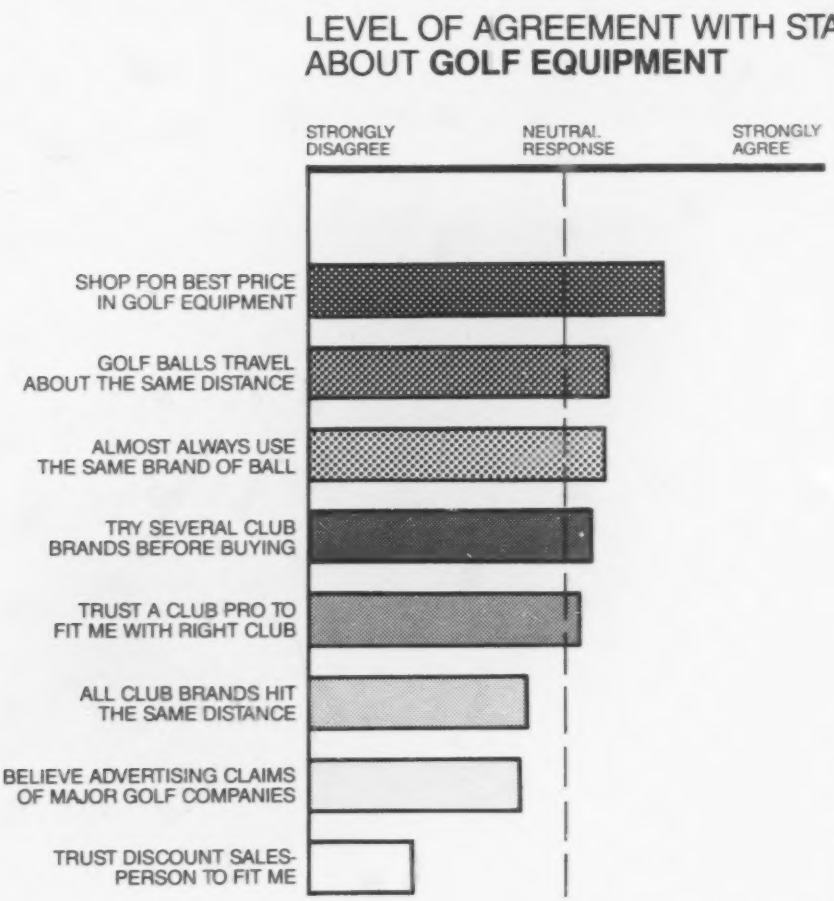
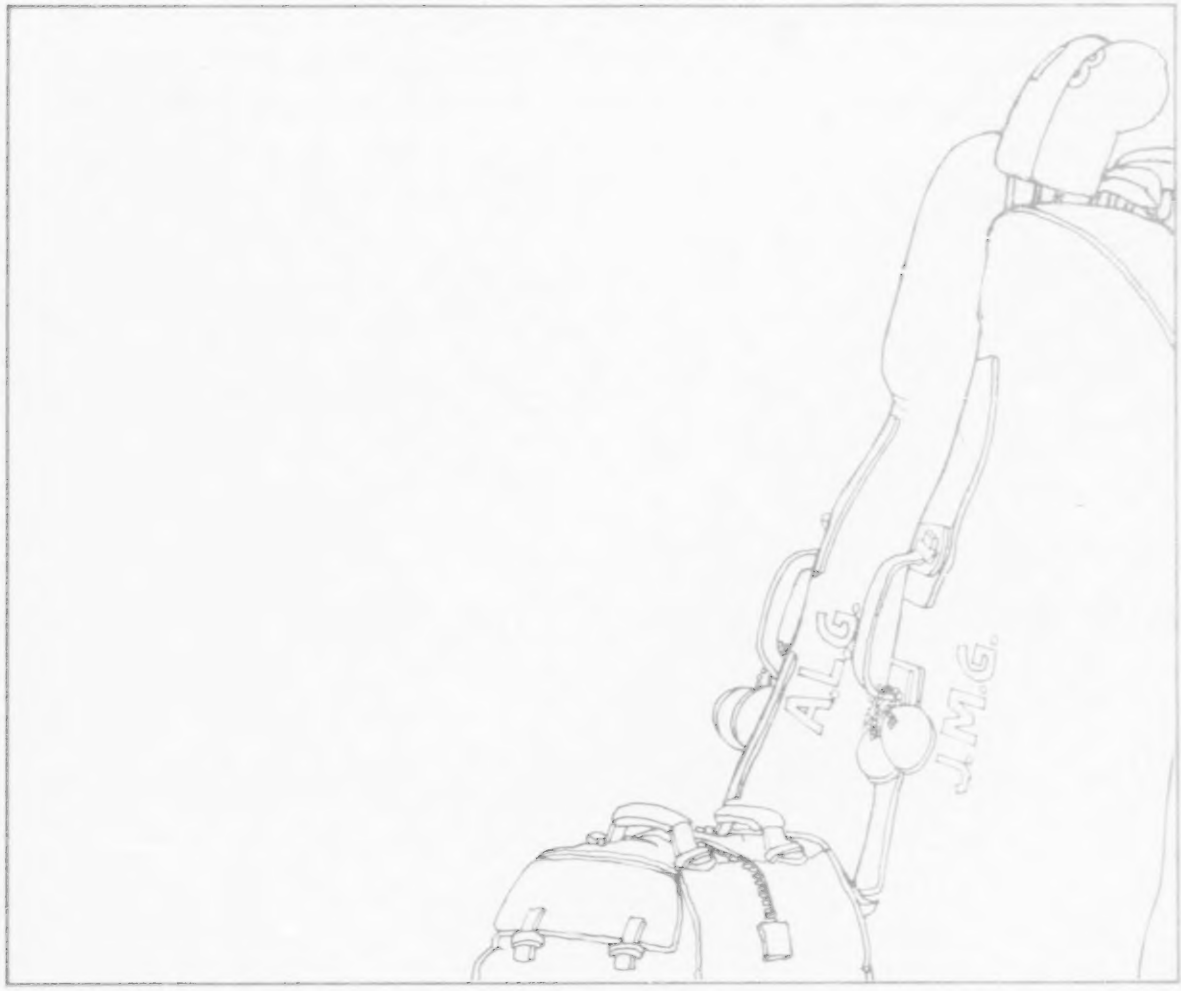

LEVEL OF AGREEMENT WITH STATEMENTS ABOUT GOLF EQUIPMENT
STRONGLY DISAGREE
NEUTRAL RESPONSE
STRONGLY AGREE
SHOP FOR BEST PRICE IN GOLF EQUIPMENT
GOLF BALLS TRAVEL ABOUT THE SAME DISTANCE
ALMOST ALWAYS USE THE SAME BRAND OF BALL
TRY SEVERAL CLUB BRANDS BEFORE BUYING
TRUST A CLUB PRO TO FIT ME WITH RIGHT CLUB
ALL CLUB BRANDS HIT THE SAME DISTANCE
BELIEVE ADVERTISING CLAIMS OF MAJOR GOLF COMPANIES
TRUST DISCOUNT SALES-PERSON TO FIT ME

Figure 6.3

Consumers do not think all golf clubs hit the same distance. They tend not to believe the claims made in advertisements and they do not trust the salespeople in discount stores.

# TRAVEL AND LEISURE



Chapter 7

# Travel and Leisure

Golf as an enticement for travel can be seen in a broad spectrum of magazines. Color photographs of emerald greens surrounded by brilliant white sandtraps or long, leaf-shadowed fairways compete for golfers' vacation dollars. The travel sections of major newspapers offer a variety of golf vacation specials. What kind of people are most likely to take these golf vacations?

With approximately 12,500 golf facilities in the United States vying to service today's 17.5 million golfers, this survey attempted to discover to what lengths a golfer will go to play golf. The survey investigated golfer's willingness to travel to and from their home course as well as their willingness to take golfing vacations. The first set of data can be valuable to developers in determining possible demand for a golf facility. The second set can be a valuable marketing tool by discovering the key variables pertaining to vacation golfers and vacation golf.

## HOME COURSE TRAVEL

In investigating travel to and from courses around golfers' homes, the survey asked two questions. The first and most basic question was to ascertain the distance from the golfer's home to the course most often played. The respondents were asked to give distance in both miles and minutes. The results, presented in Figure 7.1, showed that on the average, golfers are willing to travel about 10 miles one way to play at a local course. That translates into a 17 minute trip to the average golfer's most often played course.

There were some exceptions, however. The results showed that a junior golfer's home course is closer than the average golfer's home course. The information gleaned showed that the average junior golfer lives only seven miles from his or her home course and that on the average, it takes 12 minutes to reach the golf facility.

## DISTANCE TO MOST FREQUENTLY PLAYED GOLF COURSE

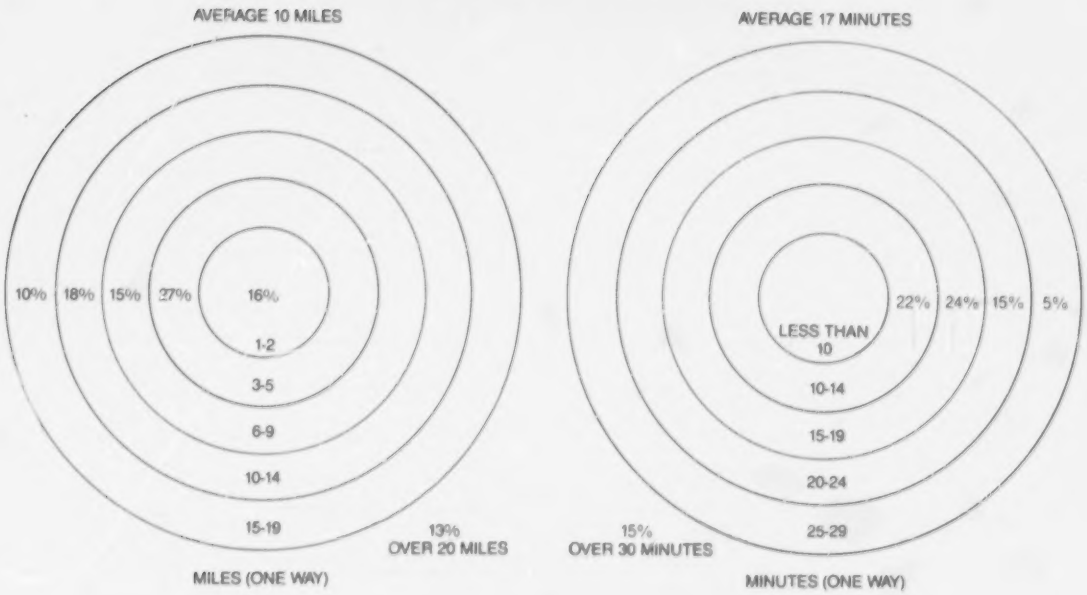



Figure 7.1

The survey also showed that there was surprisingly little difference in home course travel habits when looking at different frequency of play segments. All segments reported average travel habits. The same proved true for ability. All ability levels seemed to average the same travel distances from their homes to their most frequently played course.

More differences showed up in response to the second question posed by the study. Respondents were asked for the longest distance they would travel one way to play golf. The results, displayed in Figure 7.2, showed that golfers are willing to travel a considerable distance for an occasional round of golf, the average golfer reporting a willingness to travel 30 miles. The distance translates into an average trip of 41 minutes.

The response to this question showed some significant differences in other golfer segments. Again, and as would be expected, juniors are unwilling to travel the distance the average golfer travels. The average junior reported a willingness to travel about 18 miles to play a round of golf, an approximate 27 minute trip.

## LONGEST DISTANCE WILLING TO DRIVE

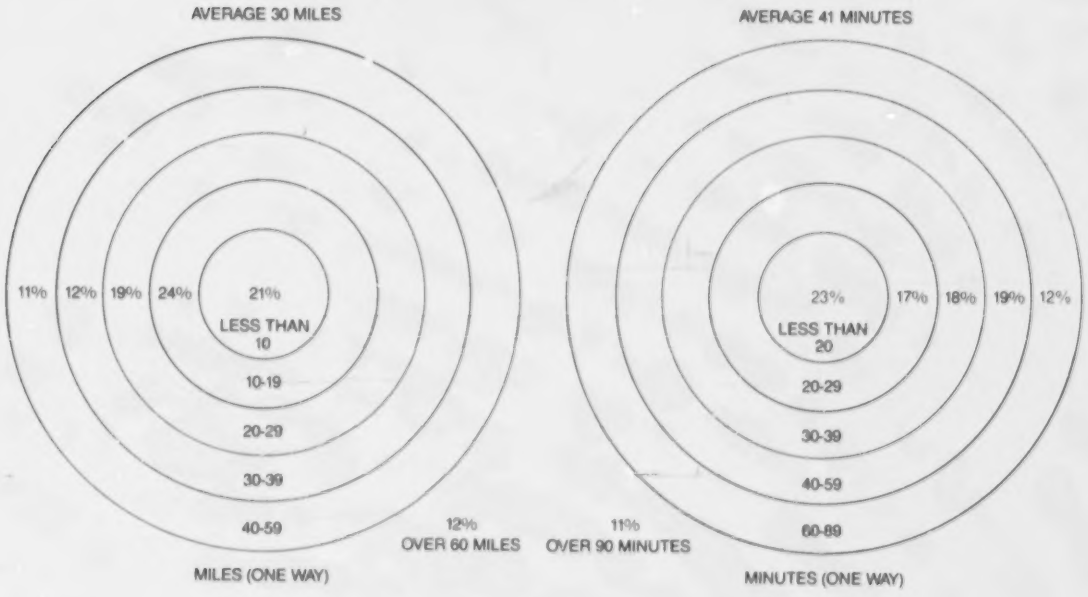



Figure 7.2

It was found that the high frequency player is willing to travel greater distances than the lower frequency golfer. The average high frequency golfer (25+ rounds per year) will travel approximately eight more minutes to play an occasional round of golf than the average golfer will travel. The average low frequency golfer reported a willingness to travel 38 minutes to play an occasional round, or three minutes less travel time than the average golfer.

### GOLF VACATIONS

The survey also investigated where people go for golf vacations and how long they stay. The first step, however, was to define a golf trip. It was decided that a golf trip is any trip that has originated from a golfer's permanent home and involves at least one overnight stay during which golf is played at least once. If golf was played while at a seasonal residence, the trip to the residence counts as one-third of all golfers reported taking at least one golf trip during the past year. Figure 7.3 shows which segments of the golfer population are most prone to take golf vacations.

| | |
|---|---|
| **All GOLFERS** | 32% |
| | |
| **Light Participation** | 21% |
| **Medium Participation** | 35% |
| **Heavy Participation** | 51% |
| | |
| **Private Golfers** | 43% |
| **Public Golfers** | 30% |
| | |
| **Competitive** | 39% |
| **Non-Competitive** | 25% |
| **Frustrated** | 25% |
| **Outdoor Relaxers** | 30% |
| **Healthy/Sociables** | 53% |

Figure 7.3

Figure 7.4 presents an age breakdown of the golf vacationer. Just under 20 percent of all reported golf vacationers were seniors. Many seniors vacation in southern climates and would, by the definition of a golf trip, classify the seasonal migration as a golf trip. The statistics confirm this, showing that 35 percent of all senior golf trips lasted over 20 days. Other golfer trips average 10 days in length.

**Age Distribution of Golf Vacationers**

| | |
|---|---|
| <20 | 8.2% |
| 20-29 | 17.9% |
| 30-39 | 20.6% |
| 40-49 | 17.3% |
| 50-59 | 16.3% |
| 60+ | 19.7% |

Figure 7.4

The average golf vacationer takes just over two golf trips per year. Seniors average about the same number of golf trips. The amount of golf played on their trips, however, varies, as would be expected, due to the differences in trip durations. While seniors average almost nine rounds per year during their golf trips, all other golfers average five rounds per year.

Figure 7.5 ranks the major destinations of golf vacations. The top three ranked states, Florida, South Carolina and Arizona, together making up 33 percent of the market is no surprise. Northern states such as Pennsylvania and Massachusetts may be a surprise to some. These states receive considerable quantities of weekend trips from the metropolitan areas which are chronically underserved by golf.

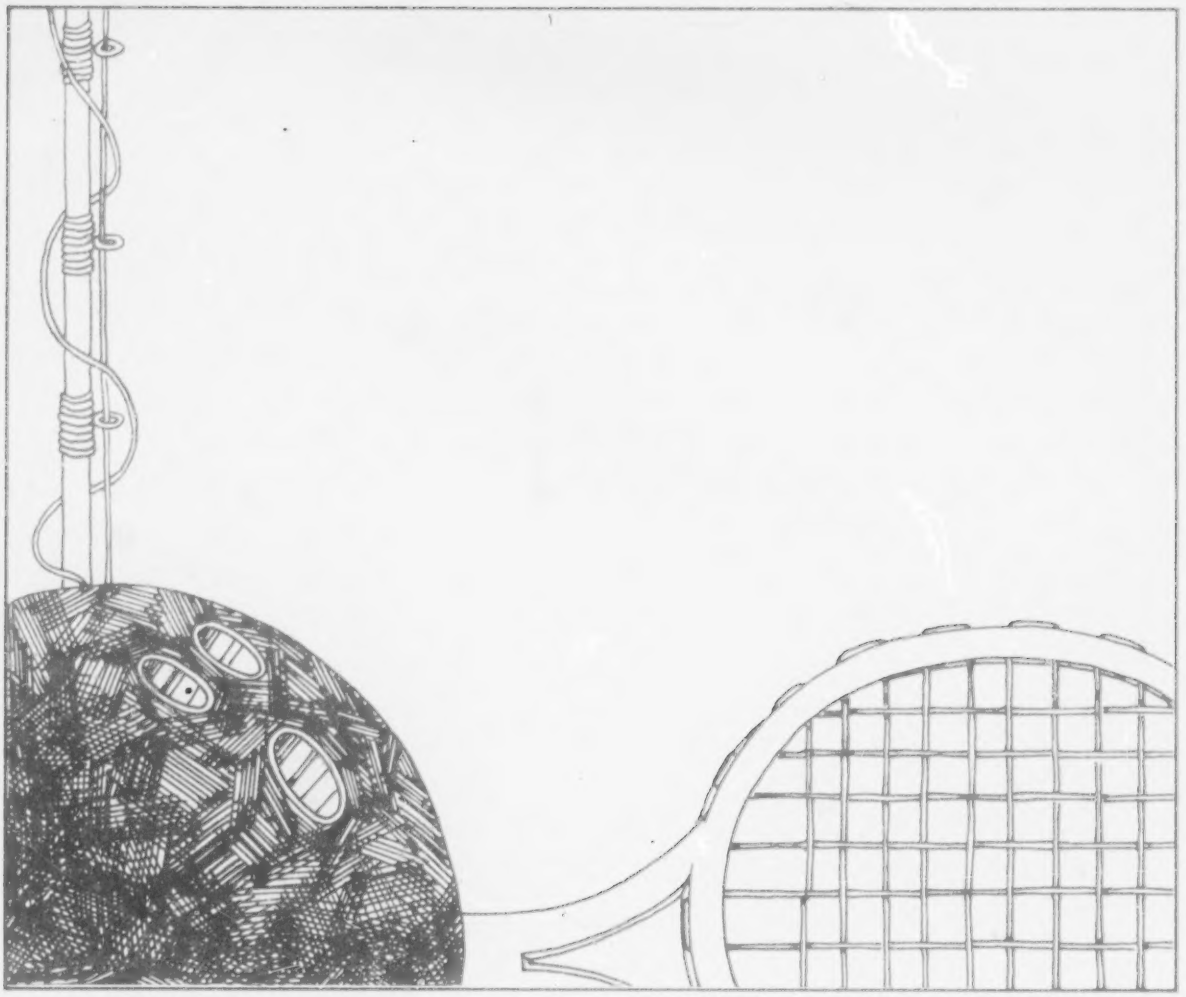
**Leading Destinations of Golf Vacations**

| | |
|---|---|
| Florida | 17.3% |
| South Carolina | 8.0% |
| Arizona | 7.6% |
| California | 6.0% |
| North Carolina | 5.9% |
| Pennsylvania | 4.4% |
| Texas | 4.3% |
| Massachusetts | 4.0% |
| Michigan | 3.4% |
| Wisconsin | 3.2% |

Figure 7.5

Twenty eight percent of all vacation golf is played at private facilities versus 72 percent public facilities. Of that 72 percent, 35 percent of play is at daily fee courses, 20 percent at resort courses and 17 percent at municipal courses. The 28 percent of golf vacationers playing private golf should probably be classified as seasonal migrants.

# OTHER SPORTS PARTICIPATION



Chapter 8

# Other Sports Participation

The hopelessly addicted golfer who abandons hearth and home every weekend in the relentless pursuit of par, spends lunch hours on the practice range and vacations prowling every new fairway to be found, lives more in fiction than in fact. Most golfers do spend a sizable portion of their sports and leisure time at the course, driving range or putting green, to be sure, but most also actively engage in other sporting exercises.

Golfers were asked to specify all the sports in which they participated, including golf, in the past 12 months. The respondents were also asked to estimate the time spent on sports participation. This information would let the researchers find out which sports compete with and/or complement golf.

The research revealed a surprising finding. A large number (30%) of golfers migrated from the golf fairways to the bowling alleys as cold weather forced golfers from the great outdoors to the sheltered bowling lanes. The percentages of golfers who participate in other sports is shown in Figure 8.1.

Time consumption is a frequently expressed criticism of golf, but golfers, overall, report spending just about 35 percent of their total sports participation time playing the game. That leaves nearly two-thirds of their participation time for other sports. Fishing, bowling, and softball/baseball represent approximately one-fourth of golfers' total sports participation time. Figure 8.2 presents a breakdown of the golfers' sports hour.

Male and female golfers both spend about one-third of their total sports participation time playing golf, but they differ considerably in terms of other sports participation. Men spend more time fishing, hunting, and playing basketball. Women spend a larger proportion of their sports time jogging, walking, swimming, and bowling. Figure 8.3 compares the sports participation profile of the male golfer with that of the female golfer.

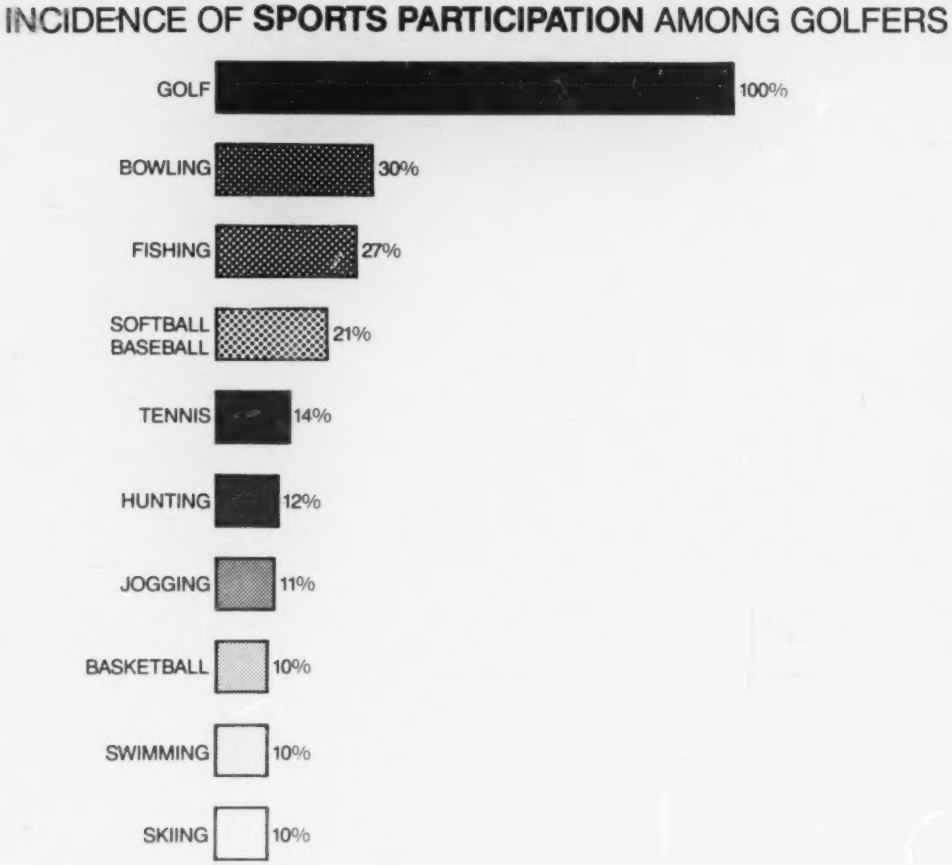



Figure 8.1

The study revealed that golf participation time is directly related to golfers' age groups. Golf participation time increases as age increases. Golfers under 20 years old spend less than 20 percent of their sports participation time playing golf, whereas golfers 60 and over spend nearly two-thirds of their time playing golf.

Figure 8.4 outlines the sports participation of golfers from different age groups. Other sports participation varies significantly by golfer age group. Team sports, such as baseball/softball and basketball, represent a large share of sports participation time for younger (under 30) age groups. In contrast, less strenuous activities such as walking account for a large proportion of sports participation time among older groups (over 50). Fishing and bowling participation time is relatively consistent among golfers over 20 years of age, suggesting these sports are complimentary to golf.

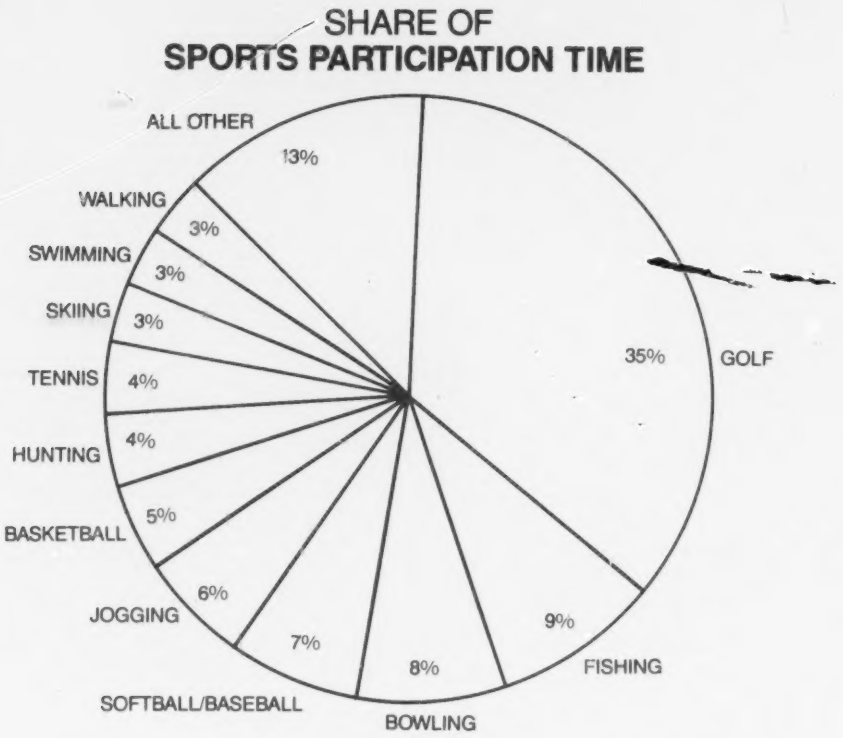



Figure 8.2

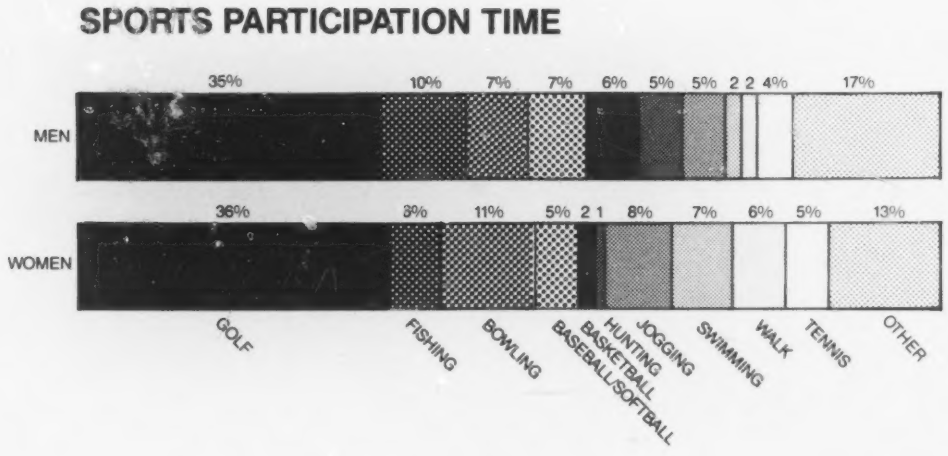



Figure 8.3

## OTHER SPORT PARTICIPATION BY AGE

| | Under20 | 20-29 | 30-39 | 40-49 | 50-59 | 60+ |
|---|---|---|---|---|---|---|
| **Golfing** | 18% | 24% | 32% | 41% | 50% | 64% |
| **Fishing** | 5% | 11% | 9% | 11% | 10% | 8% |
| **Bowling** | 2% | 9% | 11% | 11% | 8% | 7% |
| **Baseball** | 13% | 11% | 8% | 3% | 2% | 1% |
| **Basketball** | 15% | 7% | 2% | 1% | 1% | 1% |
| **Hunting** | 1% | 6% | 6% | 5% | 3% | 1% |
| **Jogging** | 7% | 5% | 9% | 6% | 5% | 2% |
| **Swimming** | 3% | 2% | 5% | 2% | 4% | 3% |
| **Walking** | 1% | 2% | 2% | 3% | 7% | 7% |
| **Tennis** | 7% | 5% | 4% | 5% | 1% | 3% |
| **Other** | 28% | 18% | 15% | 12% | 9% | 3% |

Figure 8.4

The five golfer attitude segments were compared in terms of their sports participation. Shown below is the proportionate size of each segment and the share of total sports participation time represented by each segment.

Competitors and Healthy/Sociables account for a disproportionately large share of all sports participation hours. Together, they represent 36 percent of all golfers and account for nearly half of all sports hours played. Non-Competitors and Outdoor Relaxers tend to be far less active in sports. Figure 8.5 presents the sports participation profiles of the five golfer attitude segments.

## SPORTS PARTICIPATION TIME

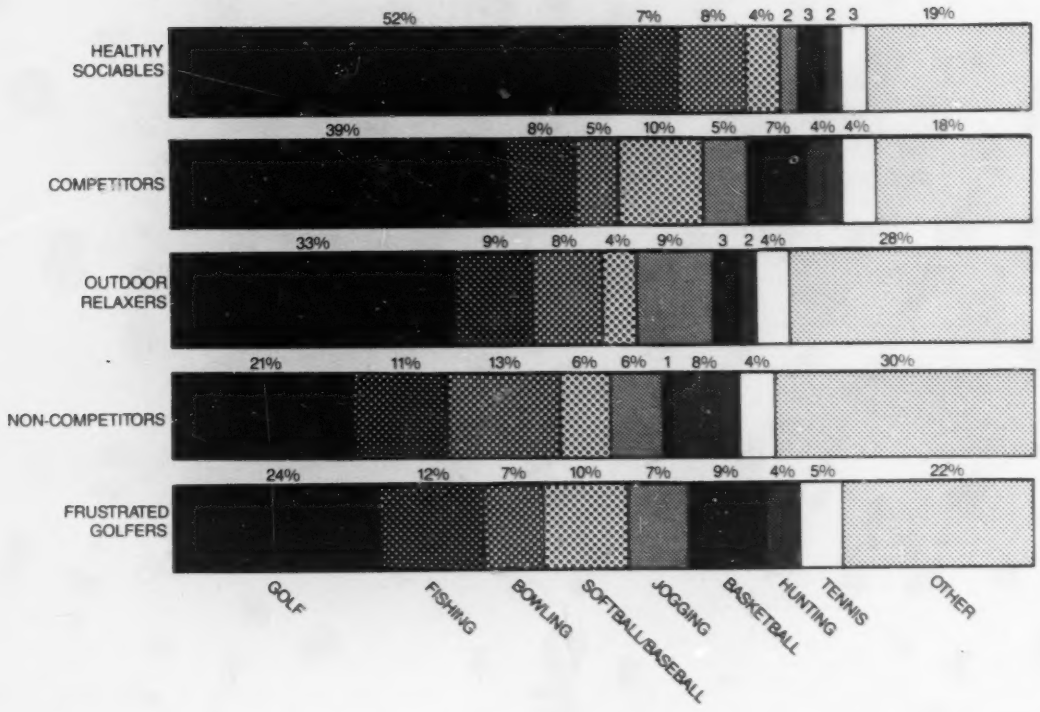



Figure 8.5

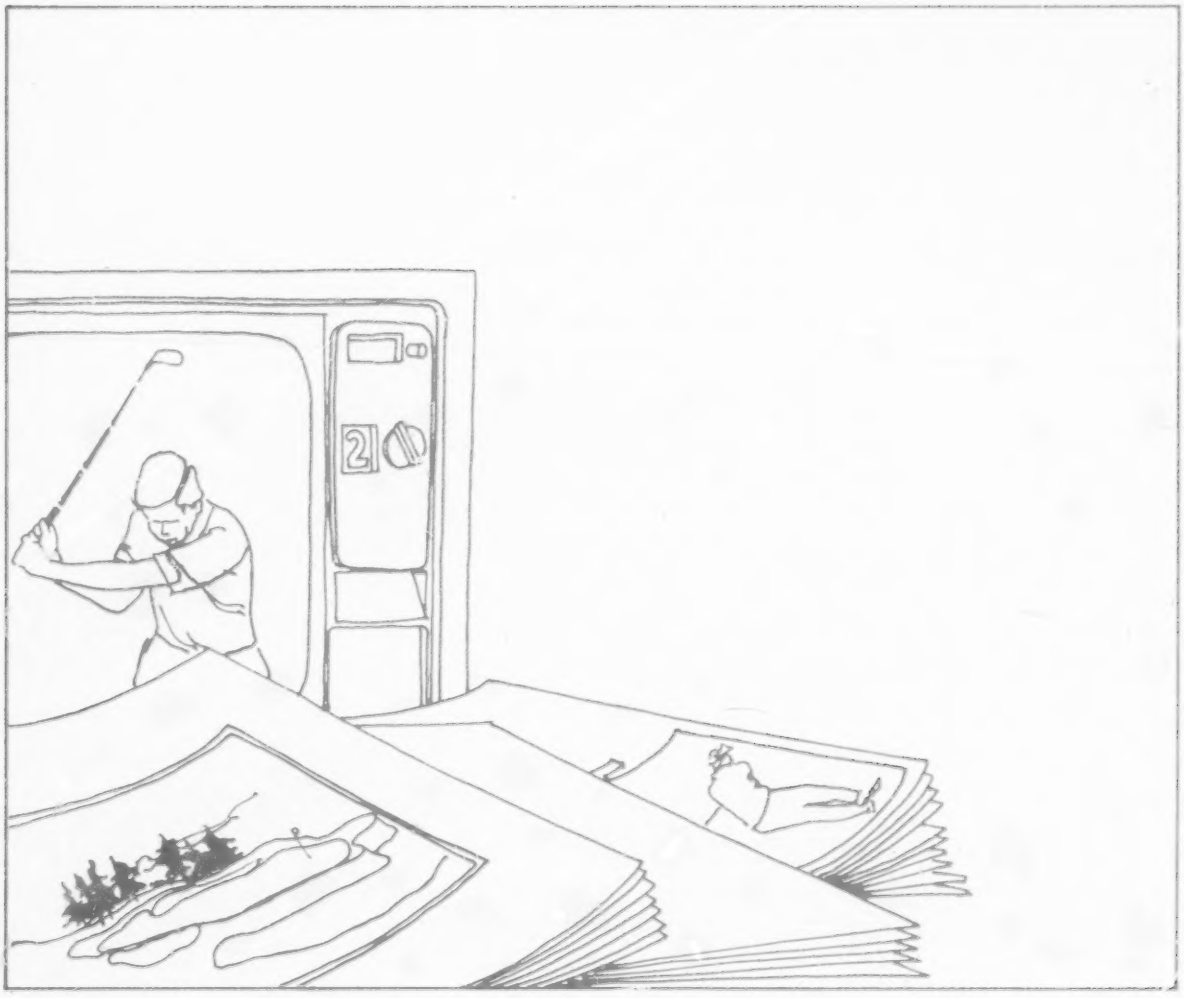
Healthy/Sociables spend a greater proportion of their time golfing than other golfer segments. Slightly more than one-half of their total sports participation time is spent on golf, while Non-Competitors and Frustrated golfers each spend less than one-fourth of their time playing golf. Healthy/Sociables tend to be less active in team sports (softball and basketball), hunting, and jogging.

Competitors are highly active in sports, but unlike Healthy/Sociables, golf commands a significantly smaller share of the Competitors' total sports participation time. Compared to Healthy/Sociables, team sports and jogging appear to be competing activities with golf among members of this segment. Bowling is less popular for this segment than for other segments.

Team sports appear to compete with golf among the Frustrated golfer segment. Softball baseball and basketball represent nearly 20 percent of sports participation time for this segment. Fishing is also popular with this segment.

Non-Competitors, the least active group in terms of sport participation, tend to be disproportionately heavy participants in fishing, hunting and bowling. Outdoor Relaxers, also an inactive sports group, are slightly more active in jogging than other segments.

# MEDIA HABITS



Chapter 9

# Media Habits

Today's golfer has a great deal of help available in his search for the perfect golf swing. Twenty years ago, someone looking for the perfect way to "golf the ball" went down to the local bookstore and maybe picked up Ben Hogan's *Five Lessons* instruction book. And, if there happened to be a copy laying around, Jack Nicklaus' *Golf My Way*.

Today, however, the golfer is inundated with a variety of multimedia instructional material. Bookstore shelves are lined with over a hundred different titles on what to do with your arms, legs, and even your mind during the golf swing. Professional golf telecasts, in an effort to enhance coverage, have enlisted the aid of touring pros and professional teachers to relate the top golfers' swings to the average weekend duffer. In just the past few years, the networks have even incorporated "instructional spots" in their tournament coverage to give us a mini-lesson on a single basic shot.

Enter, also, the videotape cassette. Designed to mesmerize, analyze, and even entertain the viewer with slow-motions, computer-enhanced graphics, and the biggest names in golf, the video instructional tape becomes the private golf lesson in your living room.

How does the golfer feel about all this information and instruction? And what does he think about the coverage of golf in the media?

## BOOKS AND VIDEOS

One might think that every golfer has gone to a golf instruction book to get started or to refine their swing, but research reveals that only 18 percent of all golfers have ever purchased a golf instruction book or instructional video cassette. Of that percentage group that appears to take the greatest interest in these items is the senior golfer, 23 percent of whom have purchased a book or tape.

Looking at the five attitude segment groups, it is no surprise that the Competitive golfer and the Healthy/Sociable are more likely to purchase a book or tape than the other groups, or that the Non-Competitive golfer is the least likely to make these purchases. The fact that only 16 percent of Frustrated golfers have purchased instructional books or tapes may say something about why they continue to be frustrated!

Of the golfers who say they have purchased golf instruction books or tapes, 97 percent say they were of some help to their game, even though only 23 percent believed the books and tapes were very helpful. Twenty-eight percent of junior golfers and 27 percent of Competitive golfers and avid golfers groups found the books and tapes most helpful.

Only two percent of all those who purchased books or tapes found them not helpful at all, but there were some exceptions. A full seven percent of those in the Competitive golfer segment group said the books and tapes were not helpful. That is by far the largest segment expressing dissatisfaction with the instruction material. This might be because this segment group represents most of the better players, and many books and tapes are geared more toward the beginning and average golfer. The fact that five percent of the high frequency golfers (those playing 25 or more times a year) found books and tapes not helpful corroborates this interpretation. But the fact remains, the vast majority of golfers do value the assistance provided by golf instruction books and tapes.

**MAGAZINES**

Readership of golfing publications by golfers is significantly higher than the rate of subscription to these magazines. While 54 percent of the respondents say they have read one or more golf publication in the past 12 months, only 19 percent subscribe to a publication. More women (21.7%) than men (18.6%) subscribe to golfing magazines. As one might expect, high frequency golfers, Competitive golfers, and Healthy/Sociable golfers claim the highest incidence of readership and subscription. Figure 9.1 outlines magazine readership and subscriber behavior by golfer segments.

**Golfer Segments**
(figures in percent)

| | Average Golfer | JR | SR | Light Freq | Medium Freq | Heavy Freq | New Starters |
|---|---|---|---|---|---|---|---|
| Magazine Reader | 54 | 50 | 64 | 38 | 64 | 75 | 34 |
| Magazine Subscribers | 19 | 21 | 30 | 6 | 24 | 40 | 16 |

Figure 9.1

If the survey respondents could play editor of their favorite golfing publication, they would add more instruction articles. Fifty percent indicated a desire for more playing assistance in their golfing magazines. Other preferences, ranked in descending order, are more player profiles, more tournament coverage, and more vacation and travel information.

## NEWSPAPER COVERAGE OF GOLF

Studies conducted by Oklahoma State University* show that newspaper coverage of golf declined significantly during the 1970s and early '80s, but it may be staging a renewed increase in copy space due to the emergence of new superstars like Greg Norman and Bob Tway, as well as events like the Nicklaus Masters victory. However, results of the Golf Consumer Profile indicate that any resurgence in readership of newspaper golf coverage has yet to be seen.

Only a third of all respondents claim to read newspaper coverage of golf tournaments on a near-weekly basis. Approximately another third said they never read the newspaper accounts of golf tournaments. Private club golfers appear to be a bit more interested in what the newspapers say than the public golfer (38% vs. 32% read nearly every week), and seniors clearly look for the golf page of the sports section more than junior golfers (53% vs. 18%).

Is the low readership of newspaper golf coverage attributable to dissatisfaction of the current level of golf coverage? Not according to the survey respondents. When asked to judge the amount of newspaper coverage devoted to golf, 76

*Masters Thesis, A. Snook, "Patterns in Sports Magazine Readership."

percent said it was just right, while only 21 percent wanted more. As one might expect, frequent golfers, the avid golfer segment group, and the Competitive golfers all wanted more coverage.

**TELEVISION**

Next to Jack Nicklaus and Arnold Palmer, television has probably had the greatest effect on golf over the last half-century. One also might say that without television, Jack and Arnie wouldn't be what they are today in sports.

Combining network and cable television makes it possible to find golf on some channel almost every weekend. There have even been efforts to create tournaments when none exist, i.e. *Shell's Wonderful World of Golf* and the most recent Skins Game. Cable television has even created golf instruction programs to whet golfer appetites during the winter months.

All this television coverage of golf appears to be just what the duffer ordered, because a full 87 percent of the survey respondents have watched at least one golf tournament on TV in the past year. Viewership increases as the golfer's frequency of play increases, 79 percent among those who play from one up to seven times per year, up to 96 percent of those who play 25 or more times per year.

While a vast majority of golfers have seen a televised tournament, not all claim to watch the total weekend coverage (Saturday and Sunday). Twenty-nine percent view half the action, and 47 percent only watch a quarter of the available weekend golf coverage when they do watch. More than three out of four golfers say they watch a televised golf tournament each month. Women outnumber men on the frequency of viewership, with 39 percent of the women watching nearly every week, while only 37 percent of the men watch every week.

While the availability of men's televised tournaments greatly surpasses that of women's tour events, the survey respondents apparently enjoy both. Nearly three out of four golfers said they watch both men's and women's tournaments on

television, while 30 percent indicated all they watch is the men's events. The percentage of women's event-only viewers was negligible.

What do viewers want to see more of in their golf telecasts? More instruction and more player profiles. The request for instruction is apparently part of that never-ending search for the perfect swing, while the desire for more profiles may well be attributed to the recent rise of younger, less known players on the PGA TOUR.

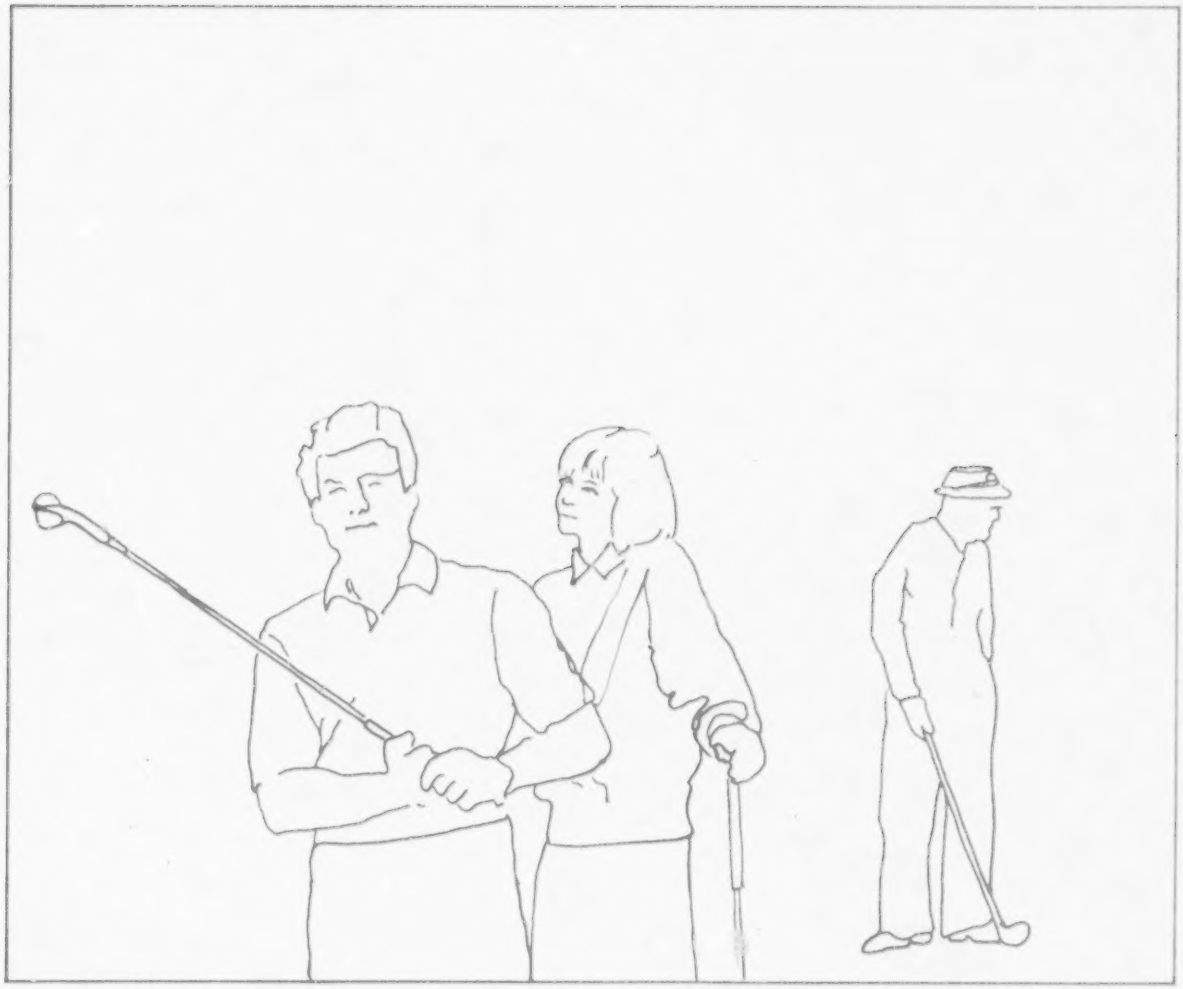
**SUMMARY**

The survey appears to indicate that golfers will take instruction any way they can get it, and that the television set may be the best modern conduit for that off-course instruction. Beginning golfers value the help they get from videocassettes, while the better player is waiting for video instruction that suits his more sophisticated needs.

Newspapers are not attracting the attention of golfers. Golfers appear to be settling for television spot news coverage of golf tournaments instead. One can only hope that this is a challenge and not discouragement to any budding golf essayists out there working for local newspapers.

Readership of golf magazines is high, with more than half of all golfers having read an article recently. But golfers say they want more instruction and more information on the "stars" of professional golf.

# CONSUMER PROFILES



Chapter 10

# Consumer Profiles


**Table 1** Golfer Profiles:
- Male Golfers
- Female Golfers
- Junior Golfers
- Senior Golfers

**Table 2** Golfer Profiles by Play Frequency

**Table 3** Golfer Profiles by Attitude Segments

**Table 4** Golfer Profiles:
- Recent Starters
- Golf Vacationers
- Private Facility Players
- Public Facility Players

Table 1

# Golfer Profiles: Male Golfers, Female Golfers, Junior Golfers and Senior Golfers

| | Total | Male | Female | JR (<20 yrs) | SR (>60 yrs) |
|---|---|---|---|---|---|
| **Rounds Played Annually (% of total)** | | | | | |
| 1-2 | 21 | 20 | 27 | 21 | 9 |
| 3-7 | 28 | 28 | 28 | 39 | 19 |
| 8-24 | 26 | 27 | 21 | 25 | 24 |
| 25+ | 25 | 27 | 24 | 16 | 49 |
| **Average Rounds Played Per Year** | 22 | 22 | 19 | 14 | 46 |
| **Would Like to Play More Golf (% of golfer segment)** | 90 | 89 | 90 | 90 | 75 |
| **Reasons Don't Play More (% agree)** | | | | | |
| No Time/Work | 71 | 72 | 68 | 61 | 33 |
| No Time /Family | 40 | 40 | 42 | 21 | 25 |
| Golf Fees too Expensive | 30 | 31 | 26 | 55 | 38 |
| Equipment too Expensive | 6 | 6 | 6 | 13 | 6 |
| Courses too Crowded | 22 | 22 | 23 | 11 | 25 |
| Not Enough Exercise | 1 | 1 | 2 | 1 | 2 |
| **Years Played Golf (% of golfer segment)** | | | | | |
| <1 year | 7 | 6 | 10 | 13 | 2 |
| 2-3 | 20 | 20 | 20 | 59 | 5 |
| 4-5 | 15 | 13 | 20 | 16 | 6 |
| 6-10 | 16 | 15 | 19 | 9 | 12 |
| >10 | 43 | 46 | 30 | 3 | 75 |
| **Introduced to Golf by Whom (% of golfer segment)** | | | | | |
| Mother | 2 | 2 | 3 | 5 | 1 |
| Father | 18 | 20 | 12 | 42 | 6 |
| Spouse | 9 | 2 | 37 | 1 | 15 |
| Male Friend | 36 | 43 | 12 | 34 | 32 |
| Female Friend | 5 | 1 | 17 | 2 | 6 |
| Golf Pro/Class Instruction | 6 | 5 | 11 | 5 | 5 |
| **First Set of Clubs (% of golfer segment)** | | | | | |
| Gift-new | 18 | 16 | 23 | 22 | 9 |
| Gift-used | 26 | 27 | 22 | 47 | 17 |
| Purchased-new | 26 | 26 | 28 | 11 | 37 |
| Purchased-used | 26 | 27 | 20 | 11 | 37 |

| | Total | Male | Female | JR (<20 yrs) | SR (>60 yrs) |
|---|---|---|---|---|---|
| **% Rounds Played At:** | | | | | |
| **Private Facilities** | 20 | 21 | 18 | 15 | 25 |
| **Daily Fee Facilities** | 50 | 50 | 52 | 54 | 43 |
| **Municipal Facilities** | 30 | 30 | 31 | 32 | 32 |
| **Private Club Membership (% of golfer segment)** | 19 | 18 | 24 | 14 | 42 |
| **% of Days Played** | | | | | |
| **9 Hole Rounds** | 43 | 40 | 56 | 53 | 44 |
| **Average Score for 18 Holes (% of golfer segment)** | | | | | |
| **<80** | 8 | 9 | 5 | 6 | 8 |
| **81-90** | 29 | 34 | 11 | 25 | 30 |
| **91-101** | 29 | 30 | 21 | 29 | 35 |
| **102-112** | 24 | 20 | 39 | 27 | 17 |
| **>112** | 10 | 7 | 24 | 13 | 6 |
| **Have Established Handicap (% of golfer segment)** | 19 | 20 | 18 | 5 | 39 |
| **Competed in Amateur Tournament (% of golfer segment)** | 31 | 33 | 25 | 20 | 41 |
| **Left-Handed Golfer (% of golfer segment)** | 6 | 6 | 5 | 4 | 3 |
| **Average Yards Hit a Drive (% of golfer segment)** | | | | | |
| **<100 - 149** | 19 | 11 | 54 | 27 | 19 |
| **150 - 189** | 21 | 19 | 30 | 25 | 31 |
| **190 - 229** | 35 | 40 | 12 | 23 | 40 |
| **230 - 250>** | 25 | 30 | 4 | 25 | 10 |
| **Average Yards Hit a 5 Iron (% of golfer segment)** | | | | | |
| **<75 - 99** | 22 | 16 | 50 | 34 | 23 |
| **100 - 129** | 20 | 18 | 30 | 19 | 23 |
| **130 - 159** | 30 | 33 | 13 | 22 | 40 |
| **160 - 170>** | 28 | 33 | 7 | 25 | 14 |
| **Flight of Golf Shot (right hand) (% of golfer segment)** | | | | | |
| **Right to Left** | 29 | 27 | 34 | 29 | 25 |
| **Straight** | 18 | 16 | 26 | 11 | 31 |
| **Left to Right** | 53 | 57 | 40 | 60 | 44 |
| **Pre-game Warm-Up (% of golfer segment)** | 60 | 63 | 49 | 63 | 575 |

| | Total | Male | Female | JR (<20 yrs) | SR (>60 yrs) |
|---|---|---|---|---|---|
| **Methods of Warm-Up (% of golfer segment)** | | | | | |
| **Stretching** | 70 | 71 | 70 | 57 | 68 |
| **Hitting Balls** | 41 | 42 | 37 | 45 | 34 |
| **Putting** | 66 | 68 | 58 | 77 | 64 |
| **Chipping** | 32 | 33 | 26 | 42 | 39 |
| **Practice without Play (% of golfer segment)** | | | | | |
| **At least once a week** | 16 | 17 | 15 | 26 | 17 |
| **About once a month** | 26 | 28 | 17 | 33 | 19 |
| **Few times a year** | 21 | 21 | 18 | 16 | 22 |
| **Never** | 37 | 34 | 50 | 25 | 42 |
| **Purchased Instruction Book/Tapes (% of golfer segment)** | 18 | 19 | 15 | 8 | 24 |
| **Read Instruction Articles (% of golfer segment)** | 66 | 70 | 54 | 51 | 83 |
| **Percentage of Play Spent in Golf Car** | 30 | 31 | 27 | 18 | 38 |
| **View Televised Tournaments (% of golfer segment)** | 87 | 89 | 89 | 87 | 97 |
| **Have Read Golf Publication in Past Month (% of golfer segment)** | 54 | 56 | 47 | 50 | 64 |
| **Took Golf Trip in Past 12 Months (% of golfer segment** | 33 | 32 | 34 | 23 | 40 |
| **Total Mean Annual Golf Expenditures ($)** | 368 | 381 | 321 | 195 | 585 |
| **Own Residence in Golf Community (% of golfer segment)** | 20 | 19 | 24 | 1 | 26 |
| **Age (% of golfer segment)** | | | | | |
| **<19** | 11 | 13 | 5 | 100 | - |
| **20-29** | 25 | 25 | 21 | - | - |
| **30-39** | 23 | 23 | 23 | - | - |
| **40-49** | 14 | 14 | 15 | - | - |
| **50-59** | 11 | 10 | 16 | - | - |
| **60>** | 16 | 15 | 21 | - | 100 |
| **Average Age (yrs)** | 39 | 38 | 43 | 16 | 67 |

| | Total | Male | Female | JR (<20 yrs) | SR (>60 yrs) |
|---|---|---|---|---|---|
| **Female Percentage of Respondents** | 21 | - | 100 | 10 | 27 |
| **Sports Participated in Past 12 Months (% of golfer segment)** | | | | | |
| **Basketball** | 5 | 6 | 2 | 15 | 1 |
| **Bowling** | 8 | 7 | 11 | 2 | 8 |
| **Fishing** | 9 | 10 | 6 | 5 | 8 |
| **Hunting** | 4 | 4 | 5 | 1 | 1 |
| **Jogging** | 6 | 5 | 8 | 7 | 2 |
| **Skiing** | 3 | 3 | 2 | 6 | 1 |
| **Tennis** | 4 | 4 | 5 | 7 | 3 |
| **Weight Training** | 2 | 2 | 1 | 3 | 1 |

Table 2

# Golfer Profiles By Play Frequency

| | Total | Light 1-7 Days | Medium 8-24 Days | Heavy 25+ Days |
|---|---|---|---|---|
| **Rounds Played Annually (% of total)** | | | | |
| 1-2 | 21 | 43 | - | - |
| 3-7 | 28 | 57 | - | - |
| 8-24 | 26 | - | 100 | - |
| 25+ | 25 | - | - | 100 |
| **Average Rounds Played Per Year** | 22 | 3 | 14 | 64 |
| **Would Like to Play More Golf (% of golfer segment)** | 90 | 92 | 92 | 82 |
| **Reasons Don't Play More (% agree)** | | | | |
| No Time/Work | 71 | 73 | 73 | 65 |
| No Time/Family | 40 | 40 | 43 | 38 |
| Golf Fees too Expensive | 30 | 33 | 29 | 26 |
| Equipment too Expensive | 6 | 8 | 5 | 3 |
| Courses too Crowded | 22 | 19 | 24 | 25 |
| Not Enough Exercise | 1 | 2 | 1 | 1 |
| **Years Played Golf (% of golfer segment)** | | | | |
| <1 year | 7 | 10 | 5 | 1 |
| 2-3 | 20 | 25 | 19 | 13 |
| 4-5 | 15 | 15 | 16 | 14 |
| 6-10 | 16 | 16 | 14 | 16 |
| >10 | 43 | 34 | 46 | 56 |
| **Introduced to Golf by Whom (% of golfer segment)** | | | | |
| Mother | 2 | 2 | 4 | 1 |
| Father | 18 | 19 | 18 | 16 |
| Spouse | 9 | 10 | 6 | 11 |
| Male Friend | 3 | 38 | 34 | 35 |
| Female Friend | 5 | 4 | 6 | 5 |
| Golf Pro/Class Instruction | 6 | 8 | 4 | 6 |
| **First Set of Clubs (% of golfer segment)** | | | | |
| Gift-new | 18 | 18 | 20 | 15 |
| Gift-used | 26 | 28 | 27 | 21 |
| Purchased-new | 26 | 22 | 24 | 34 |
| Purchased-used | 26 | 23 | 27 | 29 |
| **% Rounds Played At:** | | | | |
| Private Facilities | 20 | 18 | 17 | 27 |
| Daily Fee Facilities | 51 | 53 | 55 | 41 |
| Municipal Facilities | 30 | 29 | 28 | 33 |

| | Total | Light 1-7 Days | Medium 8-24 Days | Heavy 25+ Days |
|---|---|---|---|---|
| **Private Club Membership (% of golfer segment)** | 19 | 11 | 17 | 33 |
| **% of Days Played** | | | | |
| **9 Hole Rounds** | 43 | 46 | 42 | 40 |
| **Average Score for 18 Holes (% of golfer segment)** | | | | |
| **<80** | 8 | 6 | 10 | 12 |
| **81-90** | 29 | 23 | 28 | 40 |
| **91-101** | 29 | 27 | 32 | 28 |
| **102-112** | 24 | 28 | 23 | 17 |
| **>112** | 10 | 16 | 6 | 3 |
| **Have Established Handicap (% of golfer segment)** | 19 | 6 | 15 | 47 |
| **Competed in Amateur Tournament (% of golfer segment)** | 31 | 22 | 25 | 55 |
| **Left-Handed Golfer (% of golfer segment)** | 6 | 6 | 4 | 5 |
| **Average Yards Hit a Drive (% of golfer segment)** | | | | |
| **<100 - 149** | 19 | 28 | 13 | 10 |
| **150 - 189** | 21 | 24 | 14 | 23 |
| **190 - 229** | 35 | 29 | 42 | 39 |
| **230 - 250>** | 25 | 19 | 31 | 28 |
| **Average Yards Hit a 5 Iron (% of golfer segment)** | | | | |
| **<75 - 99** | 22 | 32 | 15 | 12 |
| **100 - 129** | 20 | 24 | 16 | 17 |
| **130 - 159** | 30 | 24 | 33 | 34 |
| **160 - 170>** | 28 | 20 | 36 | 37 |
| **Flight of Golf Shot (right hand) (% of golfer segment)** | | | | |
| **Right to Left** | 29 | 32 | 29 | 23 |
| **Straight** | 18 | 16 | 15 | 26 |
| **Left to Right** | 53 | 52 | 56 | 51 |
| **Pre-game Warm-Up (% of golfer segment)** | 60 | 52 | 63 | 72 |

| | Total | Light 1-7 Days | Medium 8-24 Days | Heavy 25+ Days |
|---|---|---|---|---|
| **Methods of Warm-Up (% of golfer segment)** | | | | |
| **Stretching** | 70 | 65 | 72 | 76 |
| **Hitting Balls** | 41 | 46 | 42 | 33 |
| **Putting** | 66 | 64 | 73 | 62 |
| **Chipping** | 32 | 26 | 38 | 35 |
| **Practice without Play (% of golfer segment)** | | | | |
| **At least once a week** | 16 | 9 | 18 | 29 |
| **About once a month** | 26 | 21 | 34 | 26 |
| **Few times a year** | 21 | 21 | 18 | 22 |
| **Never** | 37 | 49 | 30 | 23 |
| **Purchased Instruction Book/Tapes (% of golfer segment)** | 18 | 12 | 21 | 27 |
| **Read Instruction Articles (% of golfer segment)** | 66 | 54 | 71 | 86 |
| **Percentage of Play Spent in Golf Car** | 30 | 27 | 30 | 38 |
| **View Televised Tournaments (% of golfer segment)** | 87 | 79 | 92 | 97 |
| **Have Read Golf Publication in Past Month (% of golfer segment)** | 54 | 38 | 64 | 75 |
| **Took Golf Trip in Past 12 Months (% of golfer segment)** | 33 | 22 | 35 | 51 |
| **Total Mean Annual Golf Expenditures ($)** | 368 | 208 | 349 | 699 |
| **Own Residence in Golf Community (% of golfer segment** | 20 | 18 | 22 | 22 |
| **Age (% of golfer segment)** | | | | |
| **<19** | 11 | 14 | 11 | 7 |
| **20-29** | 25 | 30 | 26 | 13 |
| **30-39** | 23 | 26 | 22 | 15 |
| **40-49** | 14 | 14 | 14 | 15 |
| **50-59** | 11 | 8 | 12 | 17 |
| **60>** | 16 | 9 | 15 | 31 |
| **Average Age (% of golfer segment)** | 39 | 35 | 39 | 47 |
| **Female Percentage of Respondents** | 21 | 24 | 18 | 20 |

| | Total | Light 1-7 Days | Medium 8-24 Days | Heavy 25+ Days |
|---|---|---|---|---|
| **Sports Participated in Past 12 Months (% of golfer segment)** | | | | |
| **Basketball** | 5 | 6 | 6 | 3 |
| **Bowling** | 8 | 9 | 8 | 6 |
| **Fishing** | 9 | 11 | 9 | 8 |
| **Hunting** | 4 | 5 | 2 | 4 |
| **Jogging** | 6 | 7 | 6 | 6 |
| **Skiing** | 3 | 4 | 2 | 1 |
| **Tennis** | 4 | 6 | 4 | 2 |
| **Weight Training** | 2 | 2 | 4 | 1 |

Table 3

# Golfer Profiles By Attitude Segments

| | Total | Competitor | Non-Competitor | Frustrated | Outdoor Relaxer | Healthy /Sociable |
|---|---|---|---|---|---|---|
| **Rounds Played Annually (% of total)** | | | | | | |
| 1-2 | 21 | 12 | 30 | 27 | 21 | 6 |
| 3-7 | 28 | 17 | 41 | 34 | 27 | 18 |
| 8-24 | 26 | 33 | 21 | 24 | 30 | 26 |
| 25+ | 25 | 39 | 8 | 15 | 22 | 50 |
| **Average Rounds Played Per Year** | 22 | 31 | 9 | 14 | 17 | 47 |
| **Would Like to Play More Golf (% of golfer segment)** | 89 | 90 | 89 | 91 | 90 | 86 |
| **Reasons Don't Play More (% of golfer segment)** | | | | | | |
| No Time/Work | 71 | 68 | 74 | 72 | 72 | 72 |
| No Time /Family | 40 | 42 | 47 | 40 | 40 | 37 |
| Golf Fees Too Expensive | 30 | 32 | 30 | 38 | 23 | 23 |
| Equipment Too Expensive | 22 | 24 | 21 | 24 | 19 | 23 |
| Courses Too Crowded | 1 | 1 | 1 | 3 | 2 | 1 |
| Not Enough Exercise | | | | | | |
| **Years Played Golf (% of golfer segment)** | | | | | | |
| <1 year | 7 | 6 | 9 | 5 | 7 | 4 |
| 2-3 | 20 | 18 | 23 | 24 | 18 | 10 |
| 4-5 | 15 | 11 | 15 | 19 | 18 | 13 |
| 6-10 | 16 | 13 | 21 | 15 | 15 | 15 |
| >10 | 43 | 51 | 31 | 37 | 41 | 59 |
| **Introduced to Golf by Whom (% of golfer segment)** | | | | | | |
| Mother | 2 | 1 | 4 | 1 | 6 | 6 |
| Father | 18 | 22 | 17 | 21 | 14 | 17 |
| Spouse | 9 | 3 | 16 | 5 | 15 | 9 |
| Male Friend | 36 | 45 | 27 | 44 | 28 | 33 |
| Female Friend | 5 | 2 | 6 | 3 | 10 | 3 |
| Golf Pro/Class Instruction | 6 | 3 | 10 | 6 | 6 | 7 |
| **First Set of Clubs (% of golf segment)** | | | | | | |
| Gift-new | 18 | 16 | 20 | 17 | 20 | 15 |
| Gift-used | 26 | 29 | 29 | 28 | 20 | 23 |
| Purchased-new | 26 | 26 | 23 | 22 | 30 | 33 |
| Purchased-used | 26 | 28 | 22 | 25 | 25 | 27 |

| | Total | Com-petitor | Non-Com-petitor | Frus-trated | Out-door Relaxer | Healthy /Soc-iable |
|---|---|---|---|---|---|---|
| **% Rounds Played At:** | | | | | | |
| **Private Facilities** | 20 | 17 | 17 | 22 | 19 | 25 |
| **Daily Fee Facilities** | 51 | 51 | 54 | 48 | 53 | 48 |
| **Municipal Facilities** | 30 | 32 | 29 | 30 | 28 | 27 |
| **Private Club Membership (% of golfer segment)** | 19 | 14 | 9 | 8 | 15 | 20 |
| **% of Days Played** | | | | | | |
| **9 Hole Rounds** | 43 | 37 | 55 | 41 | 50 | 34 |
| **Average Score for 18 Holes (% of golfer segment)** | | | | | | |
| **<80** | 8 | 14 | 5 | 7 | 6 | 11 |
| **81-90** | 29 | 42 | 17 | 24 | 26 | 38 |
| **91-101** | 29 | 27 | 26 | 31 | 33 | 28 |
| **102-112** | 24 | 13 | 36 | 27 | 26 | 16 |
| **>112** | 10 | 5 | 16 | 11 | 9 | 7 |
| **Have Established Handicap (% of golfer segment)** | 19 | 31 | 6 | 11 | 14 | 36 |
| **Competed in Amateur Tournament (% of golfer segment)** | 31 | 46 | 17 | 22 | 27 | 51 |
| **Left-Handed Golfer (% of golfer segment)** | 6 | 5 | 6 | 7 | 5 | 4 |
| **Average Yards Hit a Drive (% of golfer segment)** | | | | | | |
| **<100 - 149** | 19 | 5 | 38 | 16 | 30 | 9 |
| **150 - 189** | 21 | 13 | 26 | 20 | 21 | 22 |
| **190 - 229** | 35 | 43 | 27 | 34 | 31 | 39 |
| **230 - 250>** | 25 | 39 | 9 | 30 | 18 | 30 |
| **Average Yards Hit a 5 Iron (% of golfer segment)** | | | | | | |
| **<75 - 99** | 22 | 11 | 40 | 20 | 31 | 10 |
| **100 - 129** | 20 | 9 | 25 | 22 | 23 | 19 |
| **130 - 159** | 30 | 33 | 25 | 31 | 22 | 33 |
| **160 - 170>** | 28 | 47 | 10 | 27 | 24 | 38 |
| **Flight of Golf Shot (right hand) (% of golfer segment)** | | | | | | |
| **Right to Left** | 29 | 30 | 28 | 28 | 35 | 26 |
| **Straight** | 18 | 17 | 16 | 16 | 25 | 19 |
| **Left to Right** | 53 | 53 | 56 | 56 | 40 | 55 |
| **Pre-game Warm-Up** | 60 | 75 | 47 | 61 | 52 | 74 |

| | Total | Com-petitor | Non-Com-petitor | Frus-trated | Out-door Relaxer | Healthy /Soc-iable |
|---|---|---|---|---|---|---|
| **Methods of Warm-Up (% of golfer segment)** | | | | | | |
| Stretching | 70 | 72 | 60 | 72 | 74 | 78 |
| Hitting Balls | 41 | 41 | 46 | 39 | 39 | 41 |
| Putting | 66 | 74 | 47 | 67 | 64 | 73 |
| Chipping | 32 | 41 | 16 | 26 | 32 | 41 |
| **Practice without Play (% of golfer segment)** | | | | | | |
| At least once a week | 16 | 34 | 8 | 12 | 11 | 19 |
| About once a month | 26 | 30 | 15 | 27 | 26 | 32 |
| Few times a year | 21 | 15 | 24 | 24 | 19 | 22 |
| Never | 37 | 21 | 53 | 37 | 44 | 27 |
| **Purchased Instruction Book/Tapes (% of golfer segment)** | 18 | 26 | 11 | 16 | 19 | 23 |
| **Read Instruction Articles (% of golfer segment)** | 66 | 84 | 52 | 65 | 62 | 81 |
| **Percentage of Play Spent in Golf Car** | 30 | 35 | 29 | 28 | 22 | 40 |
| **View Televised Tournaments (% of golfer segment)** | 87 | 98 | 77 | 88 | 85 | 97 |
| **Have Read Golf Publication in Past Month (% of golfer segment)** | 54 | 69 | 40 | 51 | 45 | 76 |
| **Took Golf Trips in Past 12 Months (% of golfer segment)** | 33 | 39 | 25 | 25 | 30 | 53 |
| **Total Mean Annual Golf Expenditures ($)** | 368 | 572 | 172 | 277 | 290 | 677 |
| **Own Residence in Golf Community (% of golfer segment)** | 20 | 24 | 18 | 18 | 21 | 20 |
| **Age (% of golfer segment)** | | | | | | |
| <19 | 11 | 17 | 7 | 15 | 8 | 9 |
| 20-29 | 25 | 21 | 33 | 30 | 17 | 16 |
| 30-39 | 23 | 30 | 25 | 24 | 19 | 16 |
| 40-49 | 14 | 14 | 14 | 13 | 19 | 14 |
| 50-59 | 11 | 10 | 9 | 9 | 13 | 18 |
| 60> | 16 | 9 | 11 | 10 | 24 | 27 |
| **Average Age (yrs)** | 39 | 36 | 37 | 35 | 44 | 45 |

| | Total | Competitor | Non-Competitor | Frustrated | Outdoor Relaxer | Healthy /Sociable |
|---|---|---|---|---|---|---|
| **Female Percentage of Respondents** | 21 | 9 | 34 | 13 | 33 | 16 |
| **Sports Participated in Past 12 Months (% of golfer segment)** | | | | | | |
| **Basketball** | 5 | 7 | 1 | 9 | 3 | 3 |
| **Bowling** | 8 | 5 | 13 | 7 | 8 | 8 |
| **Fishing** | 9 | 8 | 11 | 12 | 9 | 7 |
| **Hunting** | 4 | 7 | 8 | 4 | 2 | 2 |
| **Jogging** | 6 | 5 | 6 | 7 | 9 | 2 |
| **Skiing** | 3 | 2 | 5 | 2 | 2 | 4 |
| **Tennis** | 4 | 4 | 4 | 5 | 4 | 3 |
| **Weight Training** | 2 | 2 | 1 | 2 | 4 | 2 |

Table 4

# Golfer Profiles: Recent Starters, Golf Vacationers, Private Facility Players and Public Facility Players

| | Total | New-Start Past Year | Took Trip Past Year | Private | Public |
|---|---|---|---|---|---|
| **Rounds Played Annually (% of total)** | | | | | |
| 1-2 | 21 | 30 | 13 | 21 | 20 |
| 3-5 | 28 | 37 | 20 | 25 | 30 |
| 8-24 | 26 | 24 | 28 | 20 | 27 |
| 25+ | 25 | 9 | 40 | 35 | 23 |
| **Average Rounds Played Per Year** | 22 | 9 | 32 | 32 | 20 |
| **Would Like to Play More Golf (% of golfer segment)** | 89 | 92 | 89 | 82 | 91 |
| **Reasons Don't Play More (% agree)** | | | | | |
| No Time/Work | 71 | 65 | 73 | 73 | 72 |
| No Time /Family | 40 | 40 | 41 | 47 | 40 |
| Golf Fees too Expensive | 30 | 34 | 31 | 20 | 31 |
| Equipment too Expensive | 6 | 11 | 6 | 6 | 6 |
| Courses too Crowded | 22 | 13 | 28 | 17 | 23 |
| Not Enough Exercise | 1 | 4 | 1 | 1 | 2 |
| **Years Played Golf (% of golfer segment)** | | | | | |
| <1 year | 7 | 51 | 3 | 6 | 7 |
| 2-3 | 20 | 49 | 14 | 15 | 21 |
| 4-5 | 15 | - | 17 | 12 | 16 |
| 6-10 | 16 | - | 15 | 12 | 16 |
| >10 | 43 | - | 52 | 54 | 40 |
| **Introduced to Golf by Whom: (% of golfer segment)** | | | | | |
| Mother | 2 | 3 | 2 | 3 | 2 |
| Father | 18 | 11 | 19 | 18 | 18 |
| Spouse | 9 | 13 | 11 | 12 | 9 |
| Male Friend | 36 | 43 | 34 | 33 | 37 |
| Female Friend | 5 | 11 | 4 | 4 | 5 |
| Golf Pro/Class Instruction | 6 | 8 | 5 | 6 | 6 |
| **First Set of Clubs (% of golfer segment)** | | | | | |
| Gift-new | 18 | 17 | 16 | 17 | 17 |
| Gift-used | 26 | 31 | 22 | 29 | 25 |
| Purchased-new | 26 | 13 | 32 | 24 | 26 |
| Purchased-used | 26 | 14 | 28 | 24 | 27 |

| | Total | New-Start Past Year | Took Trip Past Year | Private | Public |
|---|---|---|---|---|---|
| **% Rounds Played At:** | | | | | |
| **Private Facilities** | 20 | 15 | 26 | 94 | 3 |
| **Daily Fee Facilities** | 51 | 57 | 45 | 4 | 62 |
| **Municipal Facilities** | 30 | 28 | 30 | 3 | 35 |
| **Private Club Membership (% of golfer segment)** | 19 | 15 | 24 | 59 | 5 |
| **% of Days Played** | | | | | |
| **9 Hole Rounds** | 43 | 53 | 34 | 32 | 46 |
| **Average Score for 18 Holes (% of golfer segment)** | 8 | 3 | 9 | 11 | 8 |
| **<80** | 29 | 14 | 32 | 29 | 29 |
| **81-90** | 29 | 18 | 26 | 30 | 28 |
| **91-101** | 24 | 37 | 25 | 21 | 24 |
| **102-112** | 10 | 27 | 7 | 8 | 11 |
| **>112** | | | | | |
| **Have Established Handicap (% of golfer segment)** | 19 | 4 | 3 | 33 | 17 |
| **Competed in Amateur Tournament (% of golfer segment)** | 31 | 8 | 46 | 45 | 28 |
| **Left-Handed Golfer (% of golfer segment)** | 6 | 13 | 5 | 5 | 6 |
| **Average Yards Hit a Drive (% of golfer segment)** | | | | | |
| **<100 - 149** | 19 | 34 | 16 | 22 | 19 |
| **150 - 189** | 21 | 31 | 17 | 20 | 22 |
| **190 - 229** | 35 | 26 | 39 | 35 | 34 |
| **230 - 250>** | 25 | 9 | 28 | 23 | 25 |
| **Average Yards Hit a 5 Iron (% of golfer segment)** | | | | | |
| **<75 - 99** | 22 | 43 | 17 | 23 | 22 |
| **100 - 129** | 20 | 21 | 16 | 15 | 21 |
| **130 - 159** | 30 | 27 | 32 | 35 | 29 |
| **160 - 170>** | 28 | 9 | 35 | 27 | 28 |
| **Flight of Golf Shot (right hand) (% of golfer segment)** | | | | | |
| **Right to Left** | 29 | 27 | 30 | 33 | 28 |
| **Straight** | 18 | 9 | 22 | 17 | 18 |
| **Left to Right** | 53 | 64 | 48 | 49 | 54 |

| | Total | New-Start Past Year | Took Trip Past Year | Private | Public |
|---|---|---|---|---|---|
| **Pre-game Warm-Up (% of golfer segment)** | 60 | 51 | 69 | 61 | 60 |
| **Methods of Warm-Up (% of golfer segment)** | | | | | |
| **Stretching** | 70 | 61 | 76 | 71 | 70 |
| **Hitting Balls** | 41 | 43 | 38 | 47 | 39 |
| **Putting** | 66 | 62 | 72 | 67 | 66 |
| **Chipping** | 32 | 32 | 34 | 34 | 31 |
| **Practice without Play (% of golfer segment)** | | | | | |
| **At least once a week** | 16 | 19 | 18 | 12 | 17 |
| **About once a month** | 26 | 23 | 28 | 19 | 27 |
| **Few times a year** | 21 | 17 | 25 | 27 | 19 |
| **Never** | 37 | 41 | 29 | 42 | 37 |
| **Purchased Instruction Book/Tapes (% of golfer segment)** | 18 | 9 | 23 | 22 | 18 |
| **Read Instruction Articles (% of golfer segment)** | 66 | 38 | 79 | 68 | 66 |
| **Percentage of Play Spent in Golf Car** | 30 | 19 | 40 | 46 | 27 |
| **View Televised Tournaments (% of golfer segment)** | 87 | 75 | 93 | 88 | 86 |
| **Have Read Golf Publication in Past Month (% of golfer segment)** | 54 | 34 | 66 | 61 | 52 |
| **Took Golf Trip in Past 12 Months (% of golfer segment)** | 33 | 16 | 100 | 43 | 30 |
| **Total Mean Annual Golf Expenditures ($)** | 368 | 211 | 586 | 623 | 314 |
| **Own Residence in Golf Community (% of golfer segment)** | 20 | 18 | 22 | 27 | 19 |

| | Total | New-Start Past Year | Took Trip Past Year | Private | Public |
|---|---|---|---|---|---|
| **Age (% of golfer segment)** | | | | | |
| **<19** | 11 | 29 | 8 | 7 | 11 |
| **20-29** | 24 | 40 | 18 | 12 | 28 |
| **30-39** | 23 | 15 | 21 | 23 | 23 |
| **40-49** | 14 | 7 | 17 | 19 | 13 |
| **50-59** | 11 | 6 | 17 | 19 | 10 |
| **60>** | 16 | 3 | 20 | 20 | 15 |
| **Average Age (% of golfer segment)** | 39 | 28 | 43 | 45 | 38 |
| **Female Percentage of Respondents** | 21 | 31 | 22 | 20 | 23 |
| **Sports Participated in Past 12 Months (% of golfer segment)** | | | | | |
| **Basketball** | 5 | 14 | 2 | 4 | 5 |
| **Bowling** | 8 | 6 | 6 | 5 | 8 |
| **Fishing** | 9 | 8 | 7 | 8 | 10 |
| **Hunting** | 4 | 2 | 4 | 3 | 4 |
| **Jogging** | 6 | 6 | 5 | 5 | 6 |
| **Skiing** | 3 | 2 | 2 | 1 | 3 |
| **Tennis** | 4 | 5 | 5 | 3 | 5 |
| **Weight Training** | 2 | 2 | 3 | 1 | 2 |

# Appendix A

## Sample Structure

| | | |
|---|---|---|
| **Sex** | | |
| **Total Sample** | 1,212 | 100.0% |
| **Male** | 955 | 78.8% |
| **Female** | 257 | 21.2% |
| **Age** | | |
| **Total Sample** | 1,212 | 100.0% |
| **< 19 yrs** | 137 | 11.3% |
| **20-29 yrs** | 296 | 24.4% |
| **30-39 yrs** | 273 | 22.5% |
| **40-49 yrs** | 173 | 14.3% |
| **50-59 yrs** | 137 | 11.3% |
| **>60 yrs** | 196 | 16.2% |
| **Total Annual Income** | | |
| **Total Sample** | 1,212 | 100.0% |
| **< $20,000** | 283 | 23.3% |
| **$20-29,000** | 282 | 23.2% |
| **$30-39,000** | 235 | 19.5% |
| **$40,000 >** | 412 | 34.0% |
| **Region** | | |
| **Total Sample** | 1,212 | 100.0% |
| **Northeast** | 260 | 21.5% |
| **Northcentral** | 454 | 37.5% |
| **South** | 273 | 22.6% |
| **West** | 224 | 18.5% |